OPERATIONAL DATA STORE ENTERPRISE

"The goal of education is the advancement of knowledge and the dissemination of truth."

-*John Fitzgerald Kennedy*

Updated: 8 Dec 03

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Chapter 1

Introduction and purpose

Chapter 1

Introduction and Purpose

WHAT IS ODSE ?

ODSE IS:

SIMPLY PUT IS A DATA BASE OF ALL DATA ELEMENTS (FIELDS) THAT ARE STORED IN THE MARINE CORPS TOTAL FORCE SYSTEM (MCTFS).

Introduction and Purpose

WHY ODSE ?

- One stop shopping, 24/7 access
- Fill in void of information not found on CUDDB
- Accurate and timely data
  - Cyclic, Monthly, full file refresh every SP
- Reduces cost of accessing mainframe data
  - Mainframe time - $70 per hour
- Capability to manipulate data on their own
  - Excel, Access, Word, ASCII, etc.
  - Scheduler
- Generate more timely manpower reports for user and Increased support for Deployed Units
- Reduces the need for ‘homegrown’ databases and reports that eat up precious hard drive space
  - Only stores pointers, not data

Chapter 1

Introduction and Purpose

This user guide was established to give the user a visual, as well as an instructional guide to building reports and is not within the normal parameters of traditional Marine Corps manuals. Additionally, within the software a user manual as well as Impromptu books are available.

ODSE Users Manual
C:\PROGRAM FILES \ COGNOS \ USERDATA \ ODSE
Or
Start->Programs->ODSE->ODSE Users Manual

Titled 'ODSE User Manual', this manual gives information on system goals, hardware requirements, current IP addresses, installation instructions, setting up server connections and a current listing of all the catalog fields.

Impromptu Books
C:\PROGRAM FILES \ COGNOS \ IMPROMPTU 5.0 \ BOOKS or within the Impromptu software, click on HELP -> BOOKS ONLINE

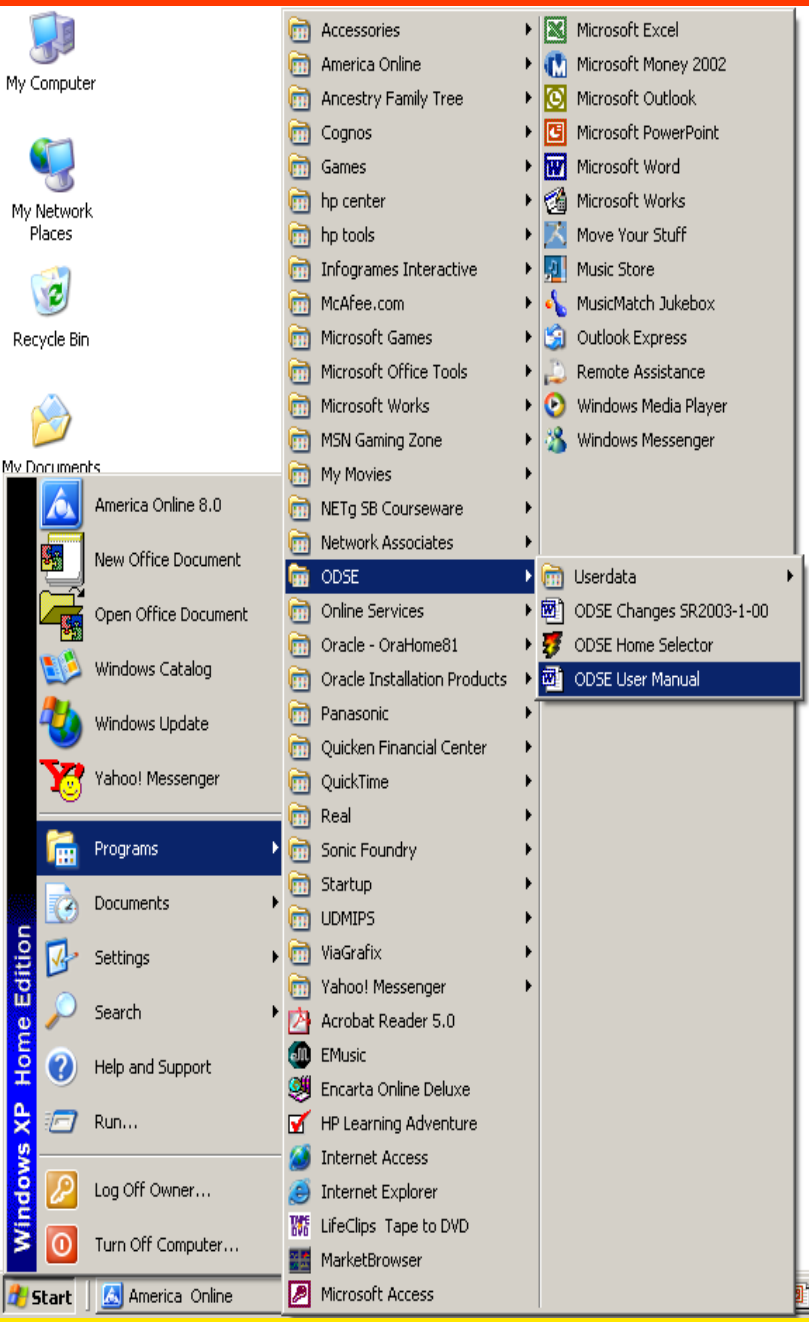
-**Discovering Impromptu**
-Automate Impromptu Using Macros
-Request Server Guide
-**Step-by-Step Impromptu Reports**
-**Mastering Impromptu**

The bolded books are recommended.

Chapter 1

Introduction and Purpose

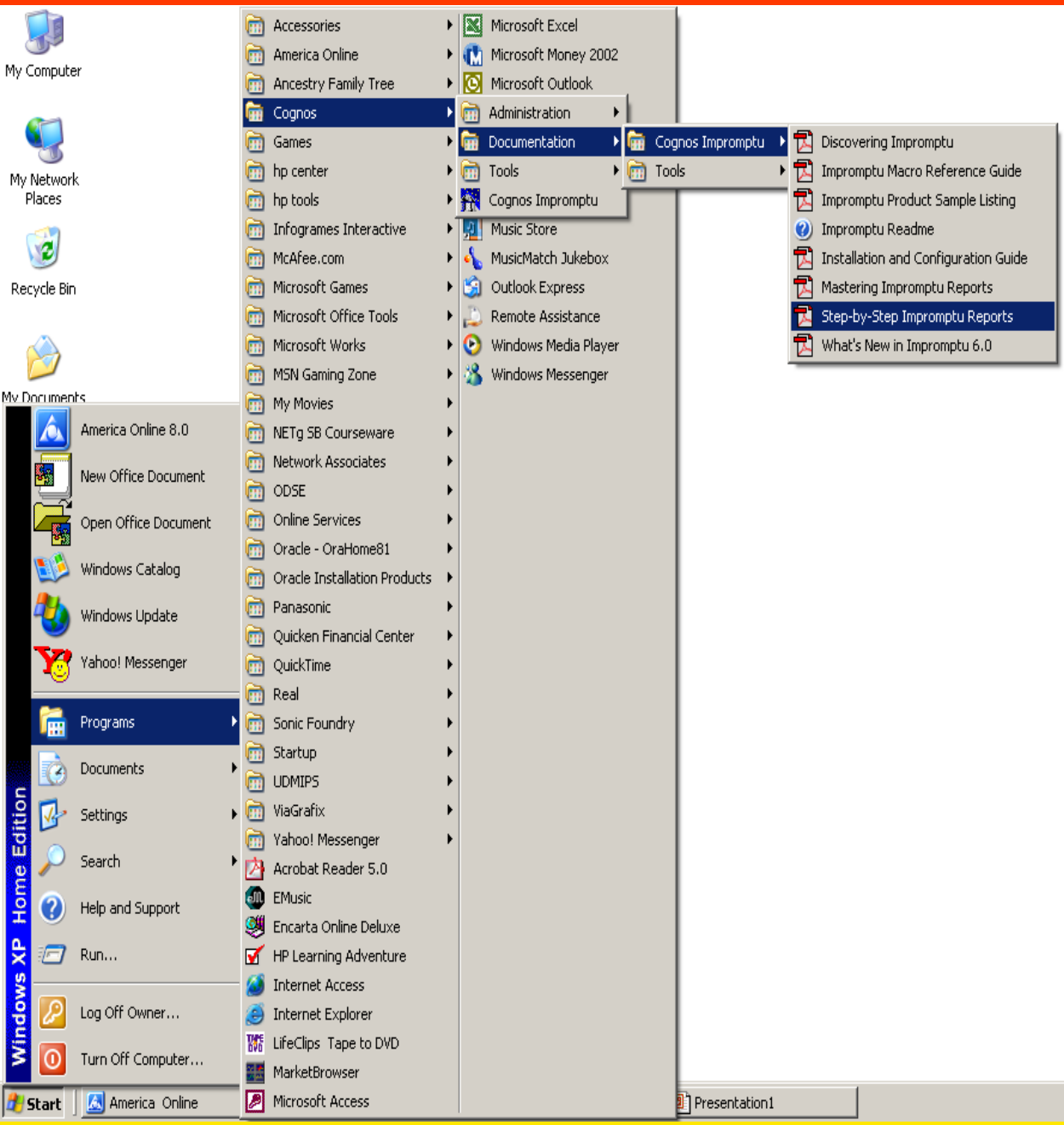
Accessing the ODSE Users Manual



Chapter 1

Introduction and Purpose

Accessing the User Guides for Impromptu



Chapter 2

ODSE Basics

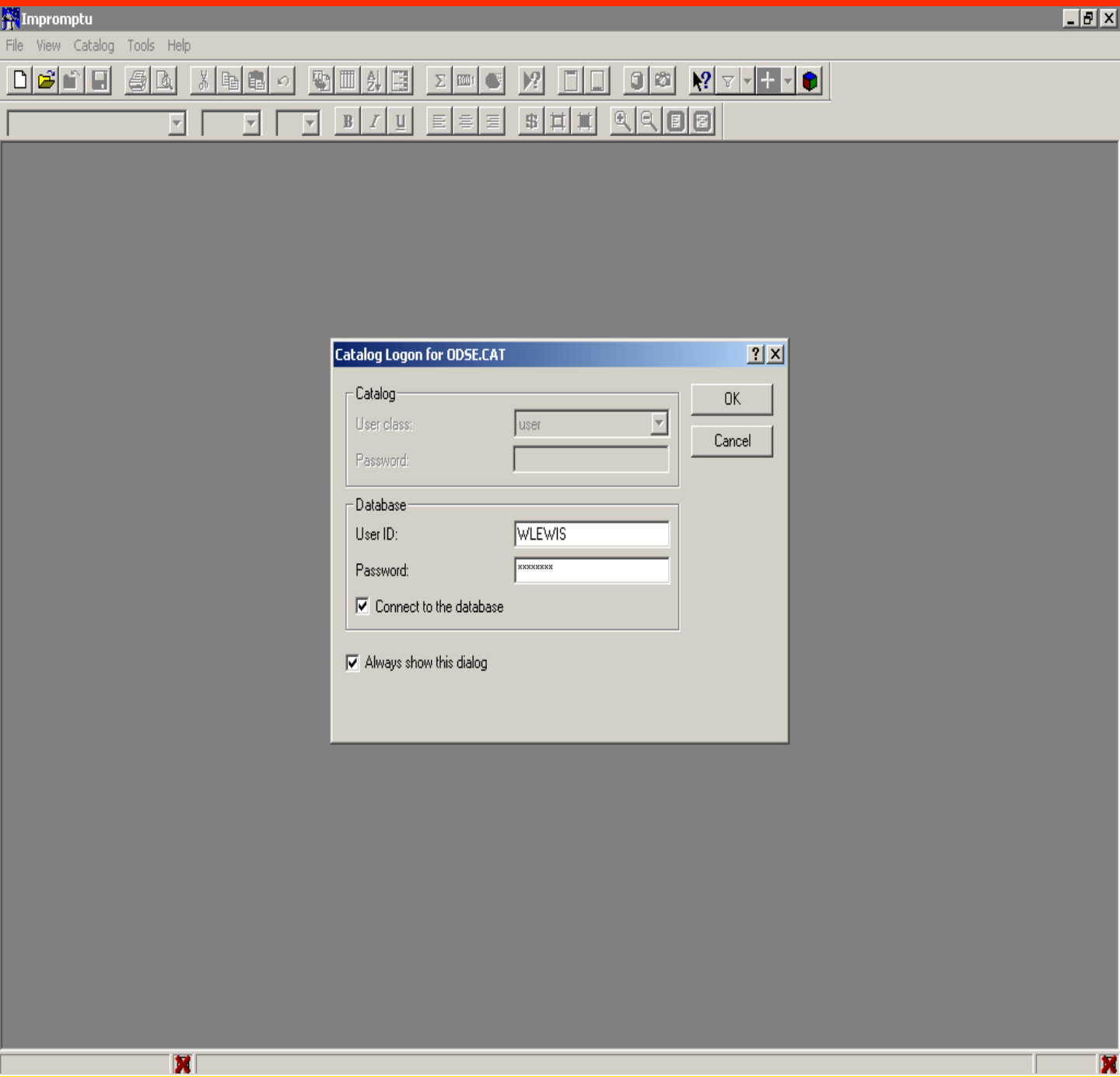
Chapter 2

ODSE Basics

HOW TO ACCESS ODSE (ACCESSING CANNED REPORTS)

Chapter 2

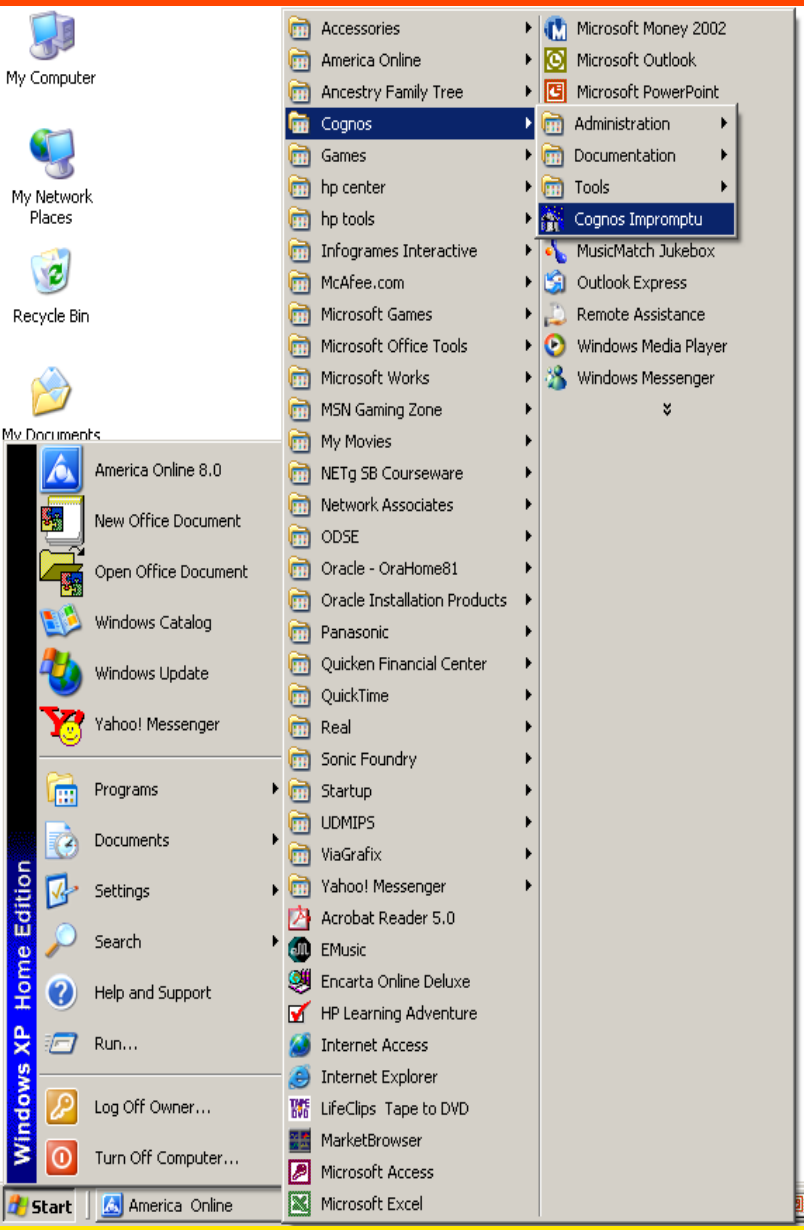
ODSE Basics



Chapter 2

ODSE Basics

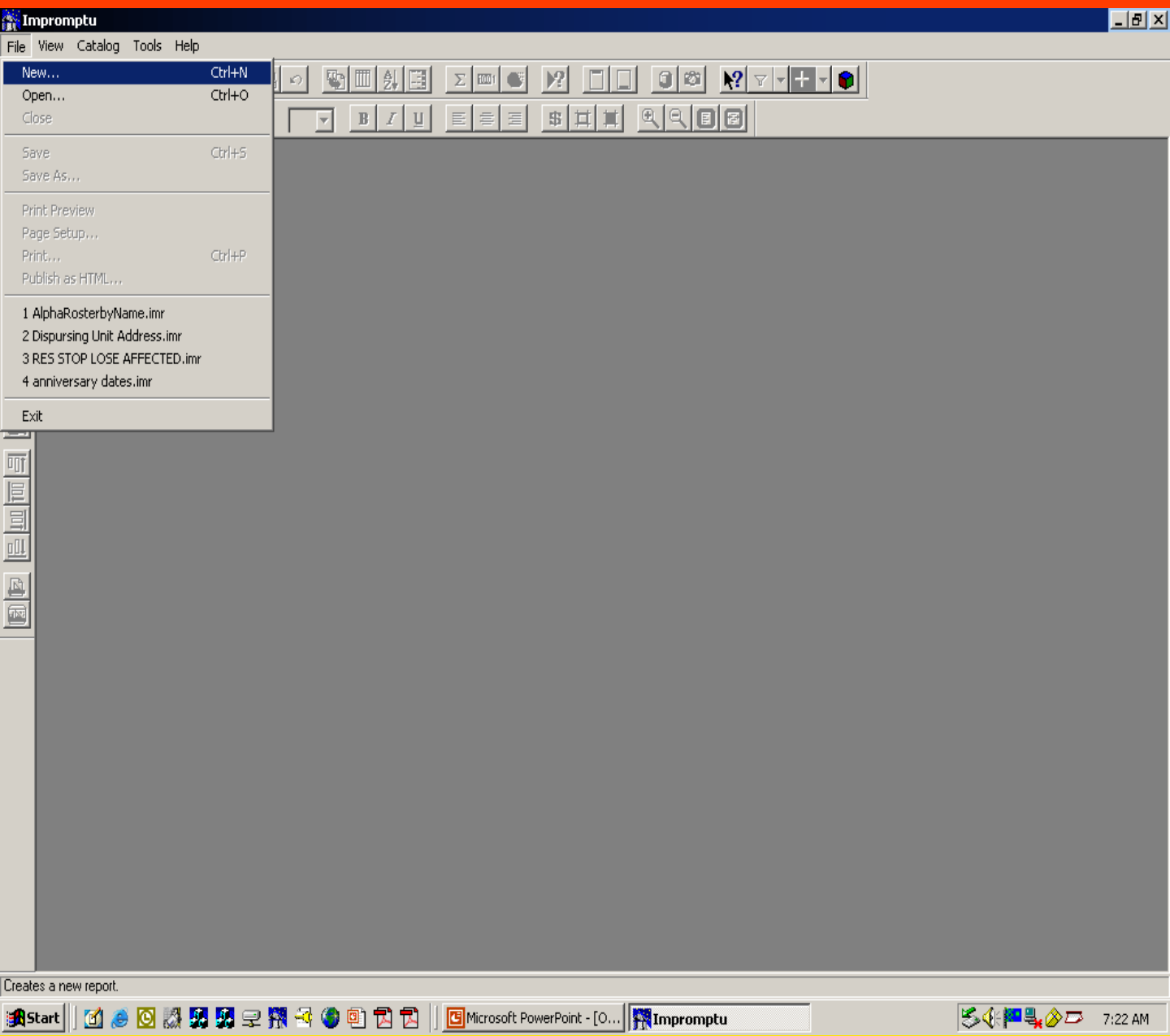
HOW TO ACCESS ODSE (CREATE A NEW REPORT)



Chapter 2

ODSE Basics

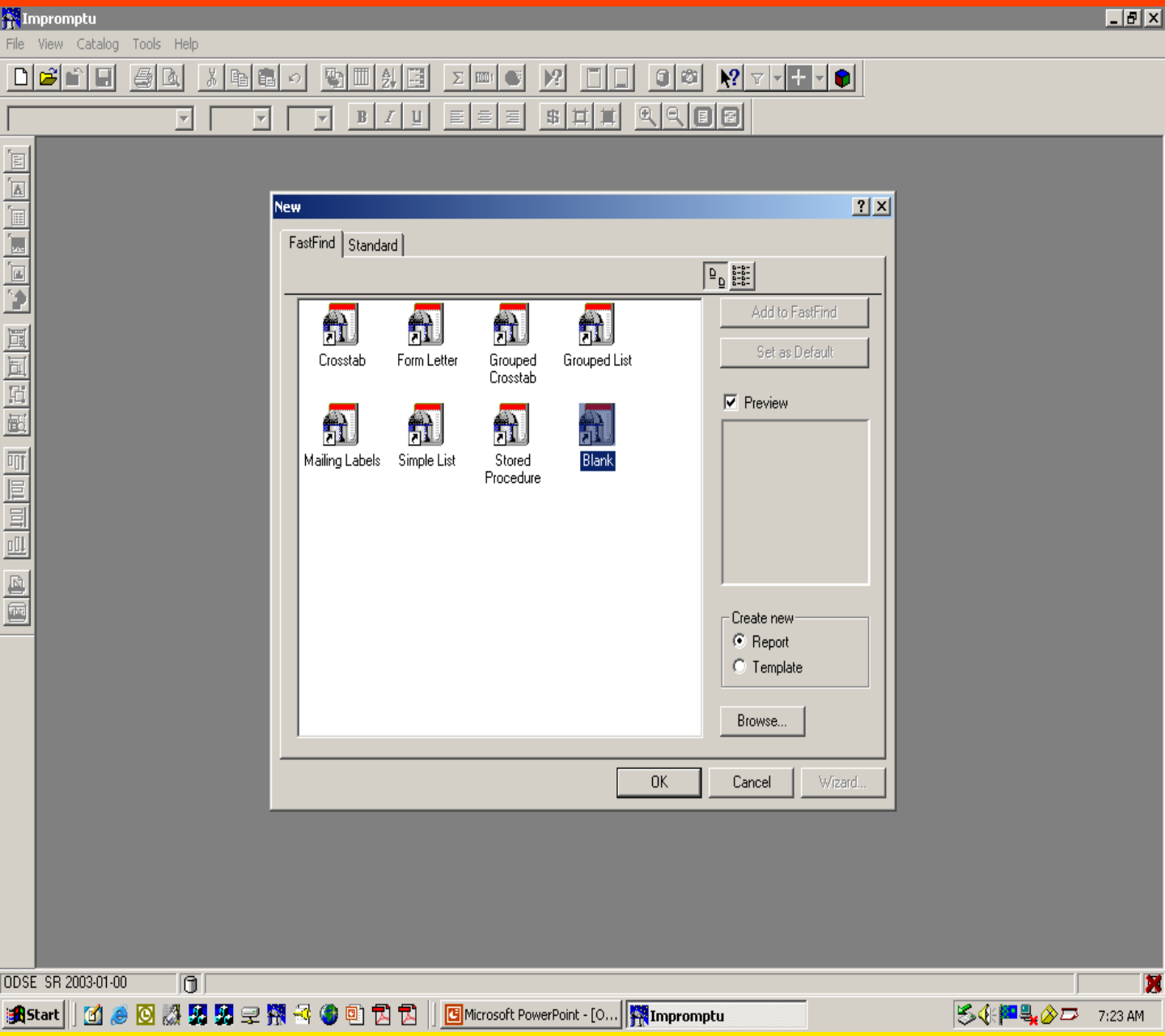
HOW TO ACCESS ODSE
(CREATE A NEW REPORT)



Chapter 2

ODSE Basics

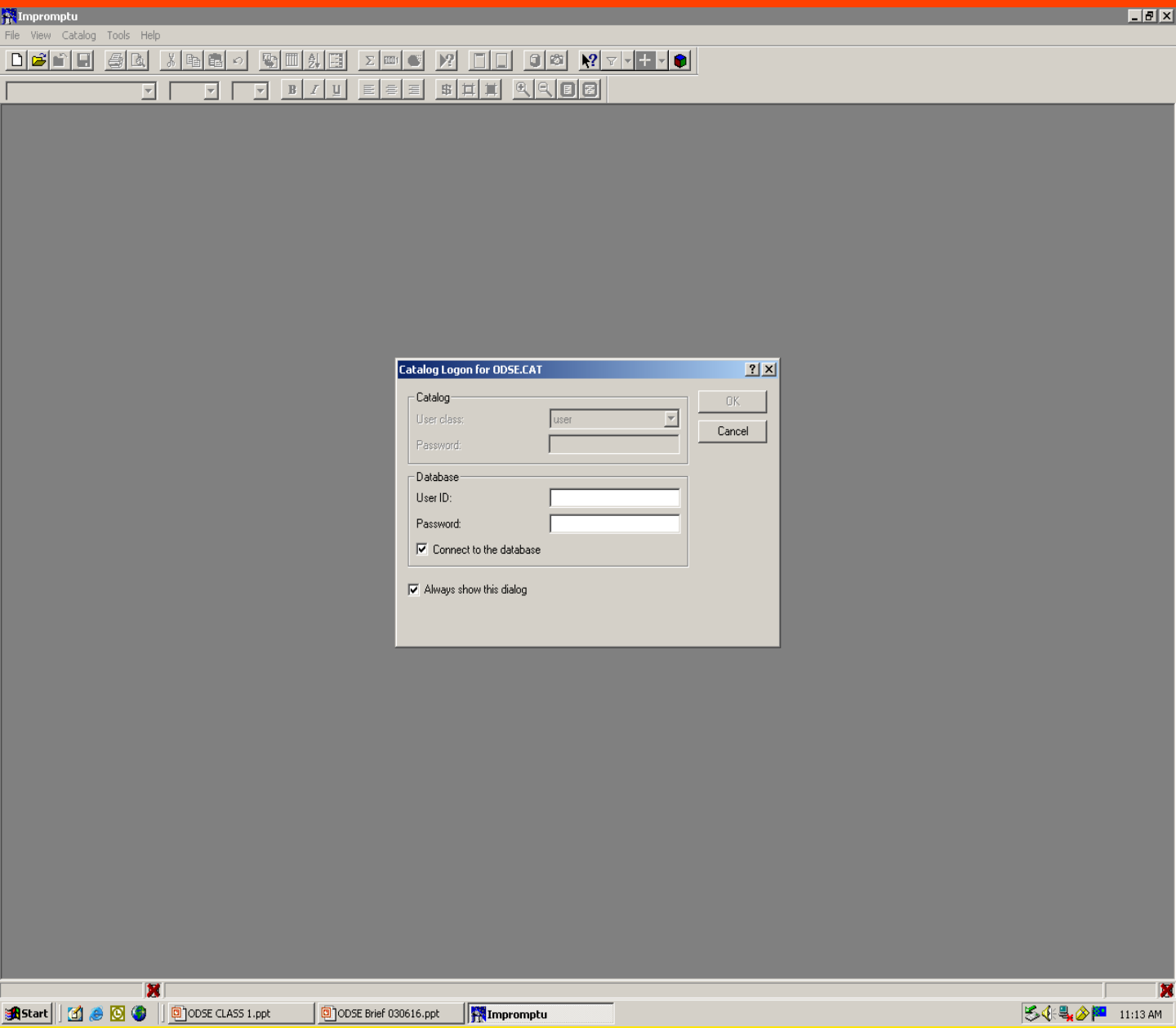
HOW TO ACCESS ODSE (CREATE A NEW REPORT)



Chapter 2

ODSE Basics

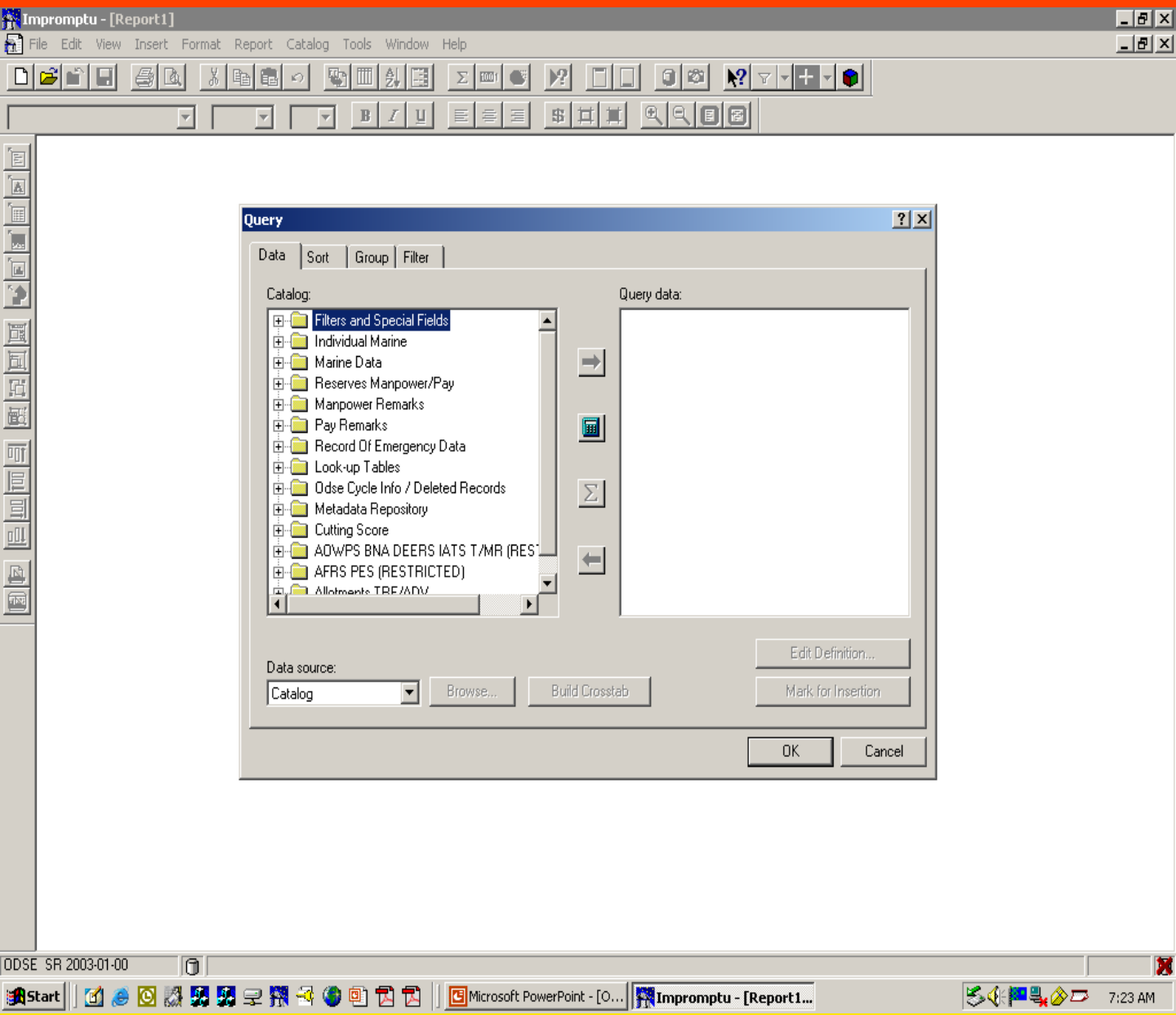
HOW TO ACCESS ODSE (CREATE A NEW REPORT)



Chapter 2

ODSE Basics

HOW TO ACCESS ODSE (CREATE A NEW REPORT)



Chapter 3

Definitions and Expressions

Chapter 3

Definitions

Calculated Data Item
A data item that shows the result of an expression that uses stored data. The value recalculates each time a value in the expression changes. For example, you can use the string operator (+) to combine a data item called Firstname with a data item called Lastname to form a calculated data item called Fullname. *For steps to building a calculated data item see Chapter 6*.

Catalog
A file (with the extension .CAT) that contains all the information necessary for Impromptu to access and retrieve information from a relational database. A catalog does not store data, but it does provide Impromptu with an organizations view of the data. A catalog also contains information about what database to access, where the database is stored, and how the tables in the catalog are joined.

Cell
The intersection of a column and row that contains a single value. *This will be used in Chapter 3 (cross-tabs*).

Chapter 3

Definitions

Crosstab
Shows summary information from a list report in a compact table of rows and columns. A crosstab shows the value for the combination of each row and column, enabling you to gain a different perspective on the data and see more without the need to scroll.
For example, you can change a list report that has three columns
(Last Name, SSN, Sex) into a crosstab that has each Sex Type as a row, each Race Type as a column, and the Total # SSNs in the cells.

Data Item
A column from a database, HotFile table, or a snapshot of a report *See Appendix A and Appendix B for data item listings*.

Database
A collection of data related to a particular purpose and organized for ease of reference. Depending on the type of database you are using, a database can contain tables, views, synonyms, and stored procedures.

Chapter 3

Definitions

Detail Filter
Limits the data retrieved in a report. A detail filter eliminates data from a report by restricting the data. For example, you could create a detail filter to specify that only the most recent MCTFS remarks to be included in the report. It is the only filter choice if you have not created a summary calculation for a report.

Expression
Any combination of operators, constants, functions, data items, and other components that evaluates to a single value.

Extension
Three characters that follow a file name. The following extensions are used by Impromptu:

For the purposes of this guide, we will only cover the below listed extensions
-Reports .imr
-Templates .imt
-Catalogs .cat
-Excel files .xls

Chapter 3

Definitions

Filter
A set of criteria used to retrieve a specific subset of records for your report. You can use a filter in reports to filter out unnecessary data and highlight the most important information in your report. For example, you can use a filter that shows only the data for your RUC or group of RUCs/Admin RUC.

Function
A function is a predefined calculation that takes one or more values, performs an operation, and returns a value. There are three kinds of functions in Impromptu: built-in Impromptu functions, functions stored in a database, and functions created by the user.

Link
The connection between a linked object and the application in which it was created. When the information changes in the source file, the changes are reflected in the destination file. You can choose to update linked information manually or automatically. *See chapter 10 for steps on linking CUDDB data into MS Access.*

Chapter 3

Definitions

Metacharacter
A character used in pattern matching, such as asterisk (*), at-sign (@), caret (^), exclamation (!), left angle bracket (<), or-bar (|), parentheses (()), pound (#), question mark (?), right angle bracket (>), or slash (\). See the expressions section of the chapter and the Formatting Your Reports Chapter (7).

Operator
Specifies what happens to the values on either side of the operator. There are four types of operators:
• Logical: defines relationships between two parts of the expression.
• Arithmetic: performs arithmetic operations on two parts of an expression.
• String: connects two character strings.
• Comparison: compares one or more values that you enter against the values in the database

Query
A question to the database, snapshot, or HotFile that defines what data you want to retrieve from the data source.

Chapter 3

Definitions

Report
A view of the current data in your units database that is organized and formatted the way you want it. The data you see in your report depends on the data you can access from your catalog. A report can be based on a template.

String
A character string enclosed in quotation marks. For example: “Cognos.”.**string_exp.** A string constant, a string data item, or any expression resulting in a string value.

Template
A template is a pattern you can use to build reports. By using templates, you can save time and effort when you create new reports. If you create the same type of report frequently, the template can be your guide. A template can contain placeholders and store formatting information. You can specify information about margin settings, page orientation, font choices for different report objects, and so on. See Chapter 9 on templates.

Expressions

=	equal to
<	less than
<=	less than or equal to
>	greater than
>=	greater than or equal to
<>	not equal to

Use the above operators when your expression has only *one value* for a specific data item.

Examples:

PRESENT REPORTING UNIT CODE = '36000'

or

PRESENT GRADE CODE = 'E6'

Expressions

When your expression has *more than one value* for a specific data item, use **IN** or **NOT IN** as your operators. Examples:

PRESENT REPORTING UNIT CODE in ('36000','36005','00026')

The above expression will provide you with a listing of the personnel in all three of these RUCS)

or

PRESENT GRADE CODE not in ('E6','E7','E8','E9')

The above expression will provide you with a listing of personnel in the grades E1 through E5 and O1through O10 and W1 through W5.

Impromptu does not understand the military pay grade system, it only recognizes ascending or descending order, which means E's (E-1 thru E-9 then O's (O-1 thru O-10 then W's (W-1 thru W5).

Expressions

Use the **OR** operator and the **AND** operator to create the filter definition you need. *Follow these guidelines when using filter definitions*.

• Use the OR operator to indicate that a row must meet at least one of the conditions on either side of the OR operator.

• Use the AND operator to indicate that a row must meet both of the conditions on either side of the AND operator.

Example: To get a listing of all females with a PFT greater than 285, the filter expression would read:
SEX = 'F' AND PHYSICAL FITNESS SCORE QY >= 285

Example: To get a listing of all females PFT scores and only the males with a PFT score greater than 285, the filter expression would read:
SEX = 'F' OR PHYSICAL FITNESS SCORE QY >= 285

Expressions

— Example of Filter Expressions Using Parentheses
—Expressions that use the AND operator are processed before expressions that use the OR operator, the following filter returns results that you do not expect:

DEPENDENTS GEO LOCATION CODE <> '285' OR MARITAL STATUS CODE = 'M' AND SERVICE SPOUSE SSN <> '0000000000'

Impromptu retrieves rows that meet the condition DGLC <> 285 OR Marital Status Code = M and Service Spouse <> to zeroes regardless of the DGLC.

Instead, use parentheses to indicate which expressions to evaluate first. The following expression returns the correct results:

DEPENDENTS GEO LOCATION CODE <> '285' OR (MARITAL STATUS CODE = 'M' AND SERVICE SPOUSE SSN <> '0000000000')

Because parentheses are processed before other operators, Impromptu first evaluates the expression in the parentheses and retrieves all the mbrs with a MarStat of M and a Svc Spouse SSN then retrieves DGLC not equal to 285.

Expressions

Retrieving Data that Contains Missing Values You can limit your report to retrieve just those rows of data that contain missing values for a specified data item. Missing values can be a blank, a variable length character field with a length of 0, or a null value (a cell that contains nothing and is marked with a flag in the database). This is great for retrieving descriptive remarks within MCTFS. If you wanted all the members with a open BAH remark you would use the following expression in your filter definition:

BAH FROM DATE IS NOT MISSING **AND** BAH TO DATE IS MISSING

You have to put both expressions in your filter to ensure that you are only getting the members with an active BAH (D901) record. If you only put BAH TO DATE IS MISSING, you will get members in receipt of BAH partl as well as members with an open BAH remark.
The below is an example of an open BAH remark, note the TO DATE is 00000000, Impromptu reads that as MISSING. ***Open remarks also have Kill Dates = 999999***

```
TJGPR901          **** BASIC ALLOW HOUSING 901 REMARKS ****         05/06/2002

      KILL                      FROM       TO     CMP  ZIP    MHA            ZIP
 SEQ  DATE   CODE  NET BAH      DATE      DATE    CDE  CODE   NBR   MHA AMT  DES
00009 999999 25015   $693.00 20020101 00000000  3   28542  178    $693.00  M

   BAH       BAH      UTIL  BAH  NBR     RENT/    UTILITY/   RENT    ADD'L
 ENTITLEMT  OFFSET    CODE  CD   SHR     MORTGAGE  MAINTNCE   /OWN   RENT/MORT
   $693.00     $0.00  N     W    1       $7777.77     $0.00            $0.00

  SUSP DATE    TAX CODE   LES CODE   ADR  TYP-DOC#-YEAR-RUC-DPI-TTC TCH DATE
```

Chapter 3

Expressions

There is often more than one way to filter data and get the same results. Depending on how your database processes requests, one method maybe more efficient than another.

Expressions

Retrieve Data that Contains a Specific String or Value You can retrieve data that begins with or contains a specified string or value. For example, the following filter retrieves only the members that have a COMBAT HISTORY remark with a LOCATION containing the word PERSIAN :

COMBAT HISTORY EXPED LOC TX **STARTS WITH** 'PERSIAN'

Or

COMBAT HISTORY EXPED LOC TX **CONTAINS** 'PERSIAN'

*This **should** provide a listing of all members that have a combat history remark (D142) of the Persian Gulf. Below is the D142 screen. This member would be listed on the report because the top remark shows that he/she was in the Persian Gulf from 19911009 through 19920219*

```
 TJMPR142          **** COMBAT HISTORY/EXPED 142 REMARKS ****       05/06/2002
SEQ   KILL DATE  COMBAT HISTORY - EXPEDITION - OPERATIONS       LOCATION
 00002  999999    SWA CEASE FIRE CAMPAIGN                  PERSIAN GULF
                  FROM DATE  TO DATE   ADR TYP-DOC#-YEAR-RUC-DPI-TTC  TCH DATE
                  19911009   19920219   B: 1-00243-1999-02021-02-0121-19991118
                                        E: 1-00243-1999-02021-02-0121-19991118

 SEQ   KILL DATE  COMBAT HISTORY - EXPEDITION - OPERATIONS       LOCATION
 00001  999999    SHARP EDGE                               MONROVIA LIBERIA
                  FROM DATE  TO DATE   ADR TYP-DOC#-YEAR-RUC-DPI-TTC  TCH DATE
                  19900805   19900821   B: 1-00243-1999-02021-02-0121-19991118
                                        E: 1-00243-1999-02021-02-0121-19991118
******************    C O M P L E T E D    ******************
```

Expressions

Filter Using a Rolling Time Period You can retrieve data for a time period that has a fixed range, where both dates continuously move (a rolling time period). To create an expression for a rolling time period, you set the current date from either:

- the database using the **Now** function
- your computer using the **Today** function.

Impromptu's date functions, such as Add-years, work with date formats. If your database uses DateTime formats, you must precede a date function in the filter with the DateTime-To-Date function to convert the format.

For Example: You filter a report to retrieve the information on personnel that have between 14 and 15 years of active service (PEBD). Instead of including the dates in the filter and changing them each time you run the report, you use the following functions in the filter definition:

PAY ENTRY BASE DATE <= add-years ((now ( )), -15) and PAYENTRY BASE DATE <= add-years (now ( ), -14)

The first part of the expression restricts the data to records dated 15 years earlier than the current date according to your database, while the second part restricts the data to records dated 14 years earlier than the current date according to your database. When you apply this filter, Impromptu captures current information for use in the expression.

Chapter 3

Expressions

Retrieve Data that Matches a Pattern of Characters

You can create an expression that retrieves data that matches a specific pattern. The pattern can include wildcard characters as follows:

• the percent sign (%) represents any number of characters

• the underscore (_) represents one character

For example:

1. You want to retrieve only the members with an SSN that **ends** with a 2, your filter would look like this:

SSN like '%2'

2. You want to retrieve only the members with an SSN that's **last four digits** start with 2, your filter would look like this:

SSN like '%2___'

Note: *Impromptu is case-sensitive. Be sure the case of the characters you enter is correct.* ***Tips for Filters*** *• To filter out repetitive information in the database and retrieve only unique rows of data, select the Eliminate Duplicate Rows check box on the Filter tab (Query dialog box).*

Chapter 4

Types of Reports

Chapter 4

Types of Reports

There are four types of reports that we will be discussing for the purposes of this users guide.

- List Reports
- Cross-tab Reports
- Templates
- Drill Through Reports

Chapter 4

Types of Reports

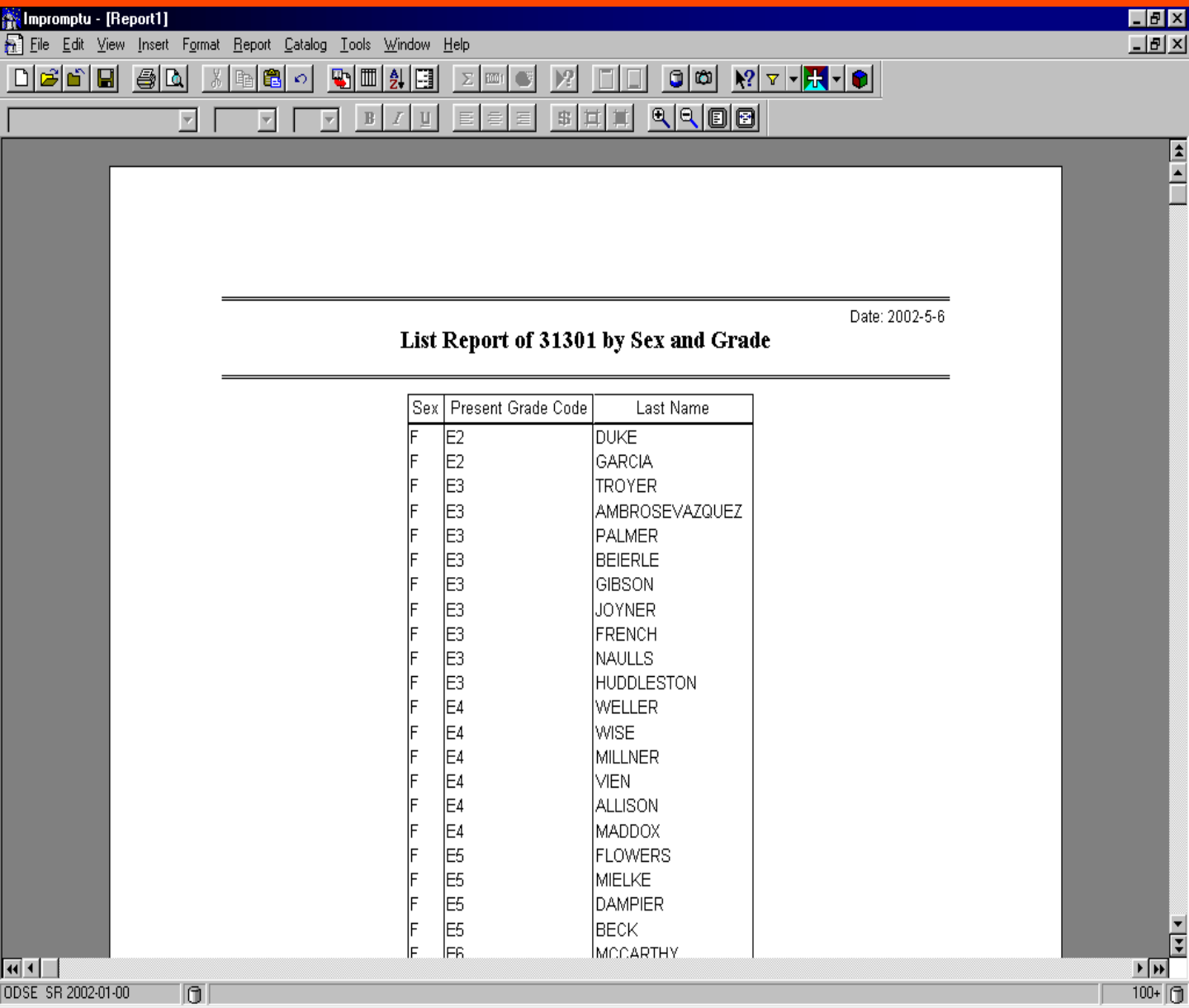
List Reports

A list report is a report that shows data in rows and columns. It is useful when you want to show detailed information from the MCTFS database, such as Last Name, First Name, SSN etc. The default template for new list reports is called Simple List. You can use a Simple List report as a base for grouping, summarizing, filtering, and/or formatting your data. The list report is a building block on which you can create more complex reports.

Chapter 4

Types of Reports

This is what a list report looks like.



Chapter 4

Types of Reports

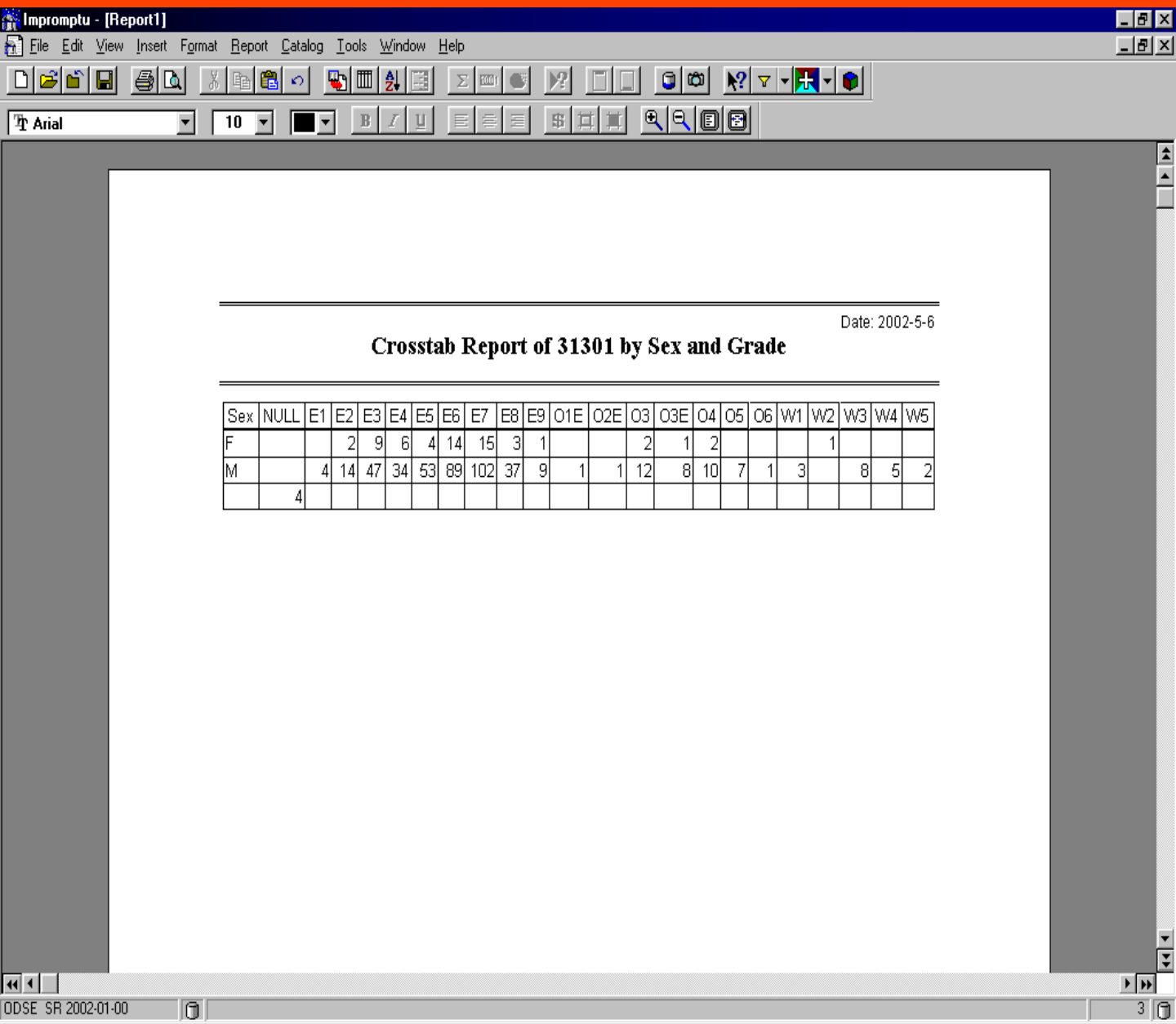
Crosstab Reports

Crosstab reports provide a different perspective on your data. One of the advantages of using the Crosstab report is that you can change your view of the data by changing its presentation. A crosstab report summarizes information in a concise table of rows and columns that shows the value at the intersection point of each row and column. A crosstab report is made up of grouped data items shown on the left side and across the top of the report, with summarized data items shown within the cells.

Chapter 4

Types of Reports

This is what a Crosstab report looks like.



Sex	NULL	E1	E2	E3	E4	E5	E6	E7	E8	E9	O1E	O2E	O3	O3E	O4	O5	O6	W1	W2	W3	W4	W5
F			2	9	6	4	14	15	3	1			2	1	2				1			
M		4	14	47	34	53	89	102	37	9	1	1	12	8	10	7	1	3		8	5	2
	4																					

Chapter 4

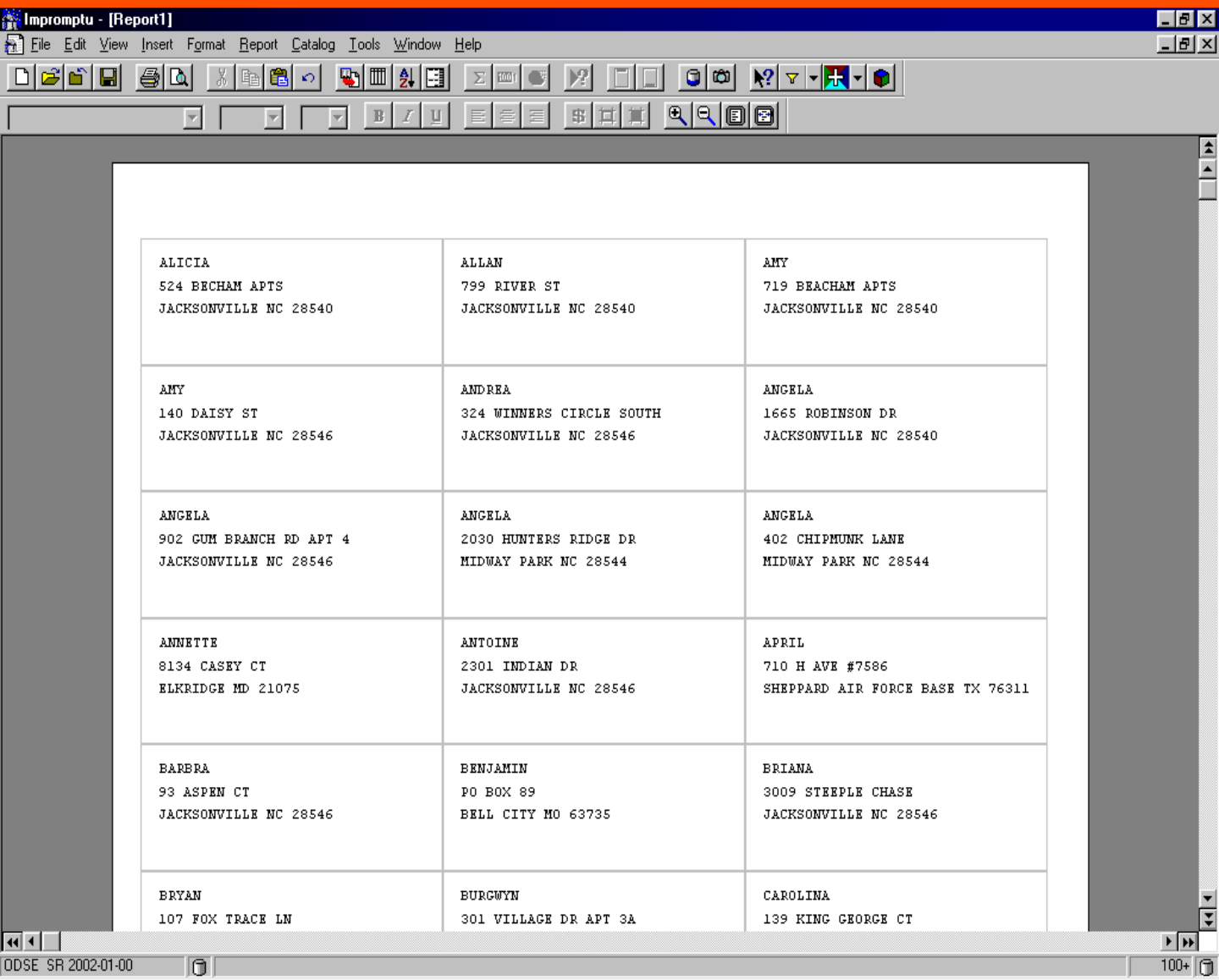
Types of Reports

Templates

Templates only store formatting and placeholders. They can save you time and help you produce reports and letters that are consistent with your units standards. Templates also simplify the process for creating new reports. If Impromptu contained no templates, you would start with a blank report and add frames every time you wanted to create a report. For example, a mailing label allows you to take data from your CUDDB or ODSE catalog and place it in a format of a mailing address vice a list report. You can save these address labels as a template to make it easier to update at a later date.

Types of Reports

This is what your list report with a template for mailing list would look like.



Chapter 4

Types of Reports

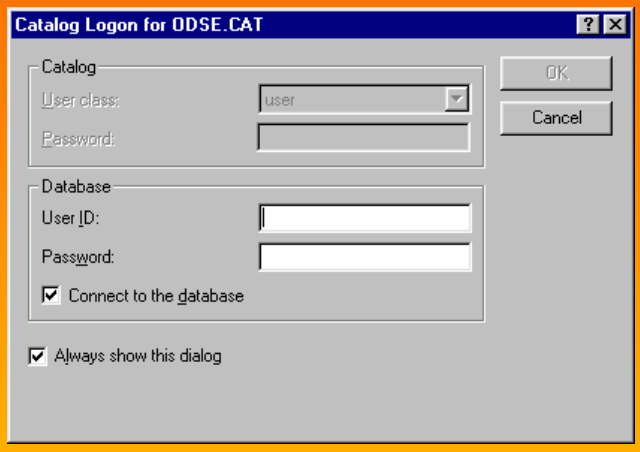
Template can be applied to mailing labels, SRB/OQR labels, birthday letters, promotion letters, group orders, etc.

** Work smarter…not harder! **

Chapter 5

Beginner Reports

To access your ODSE catalogs by clicking on
START->
PROGRAMS->
ODSE->
Userdata->
ODSE, then click on the ODSE.CAT



The above window will appear. Enter your ID and password and click on OK

To make an Impromptu Icon on your desktop, right click on the desktop, click on NEW->SHORTCUT, click on the browse button. Go to C:->Program Files->Cognos->Cer1->Bin, then click on ImpUser.exe and then click next, give the icon a name (ODSE) and click on finish.

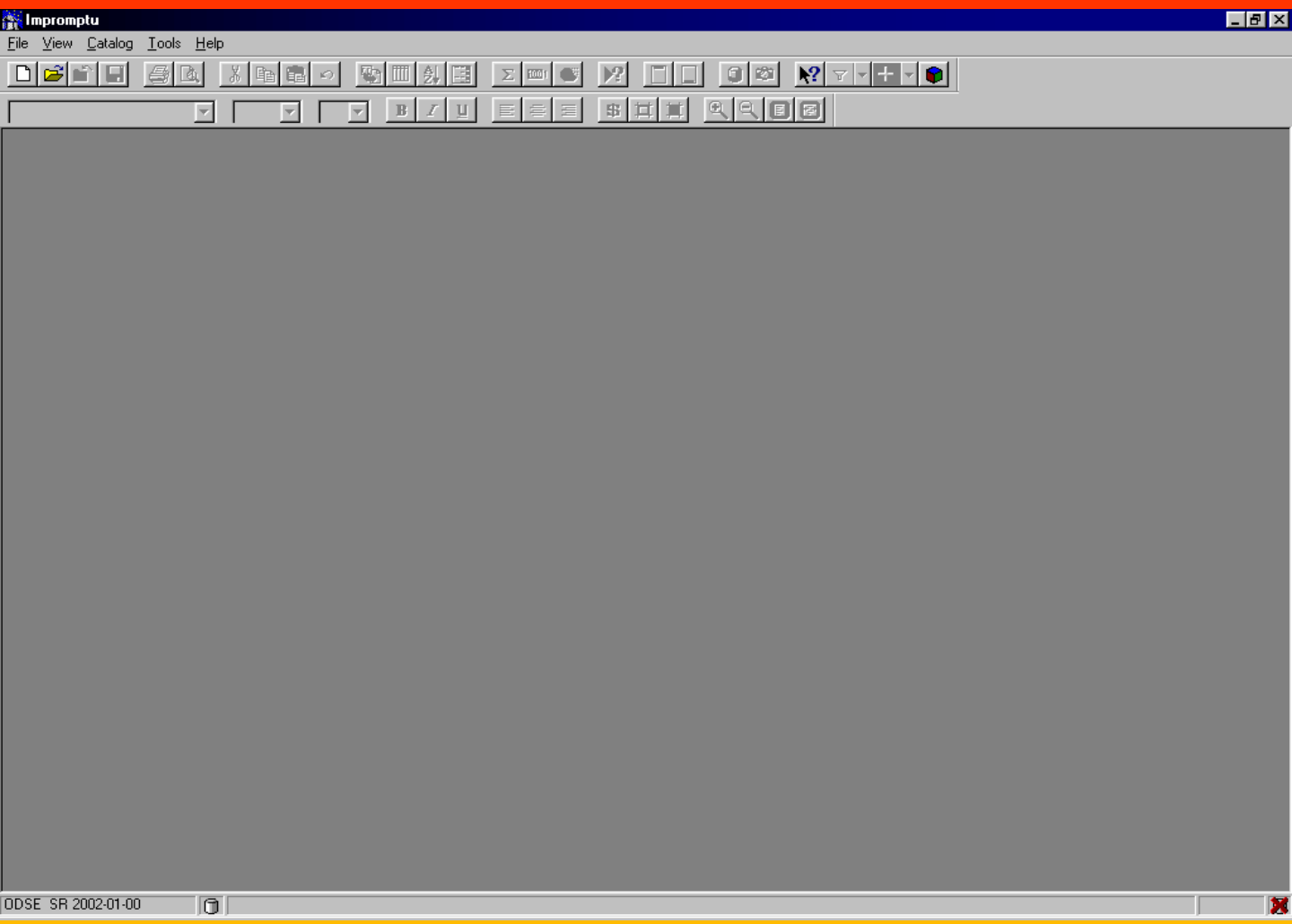
Chapter 5

Lets build a report!

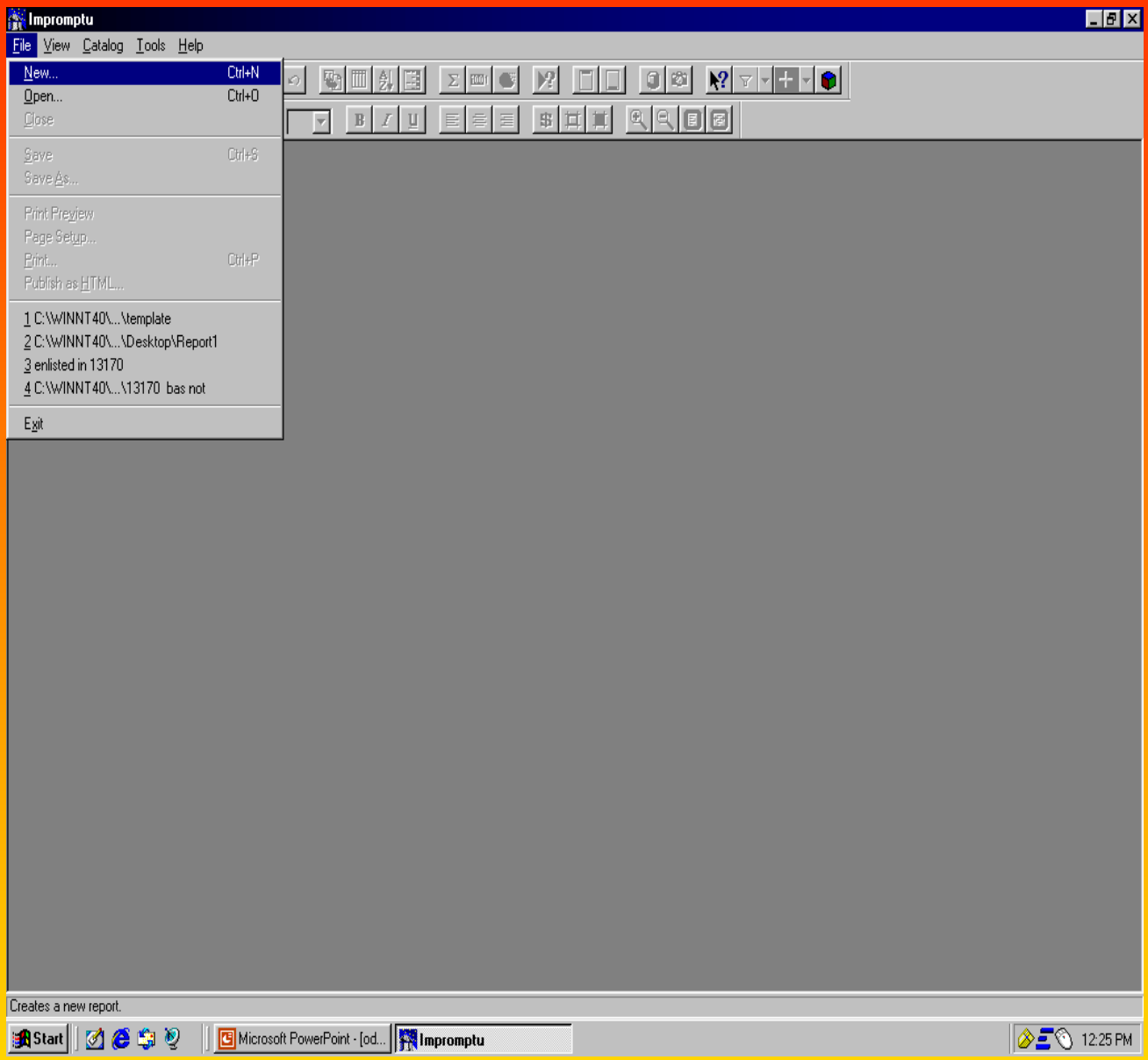
You have just been tasked with providing a listing of all the E-6’s within your RUC 36000.

The following will guide you through the steps required to accomplish this mission.

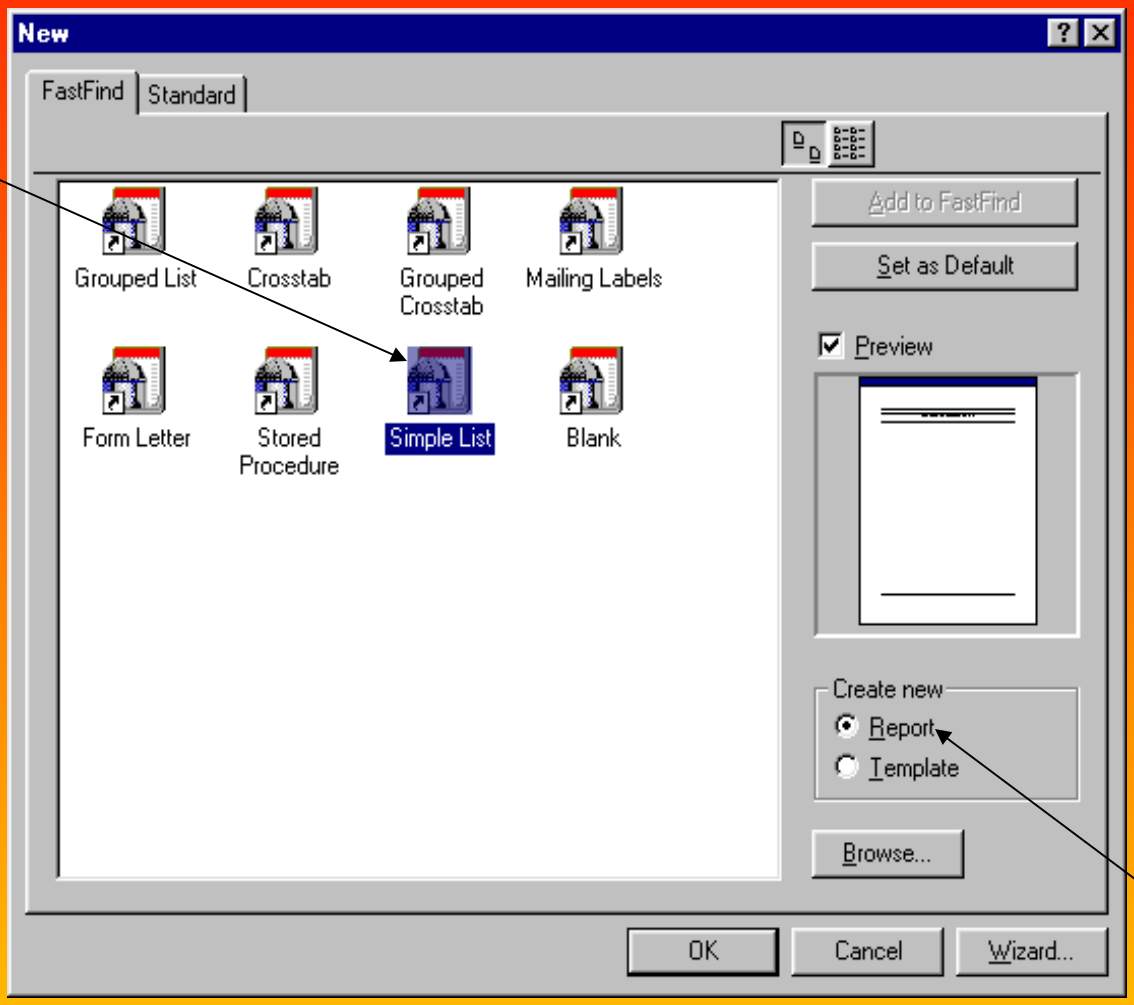
Chapter 5



For the purposes of this users guide, we will always use FILE--> NEW to create reports.
Clicking on the first icon (sheet of paper) will start the wizard to create a report. The wizard does not offer the same functionality(s) as FILE --> NEW.

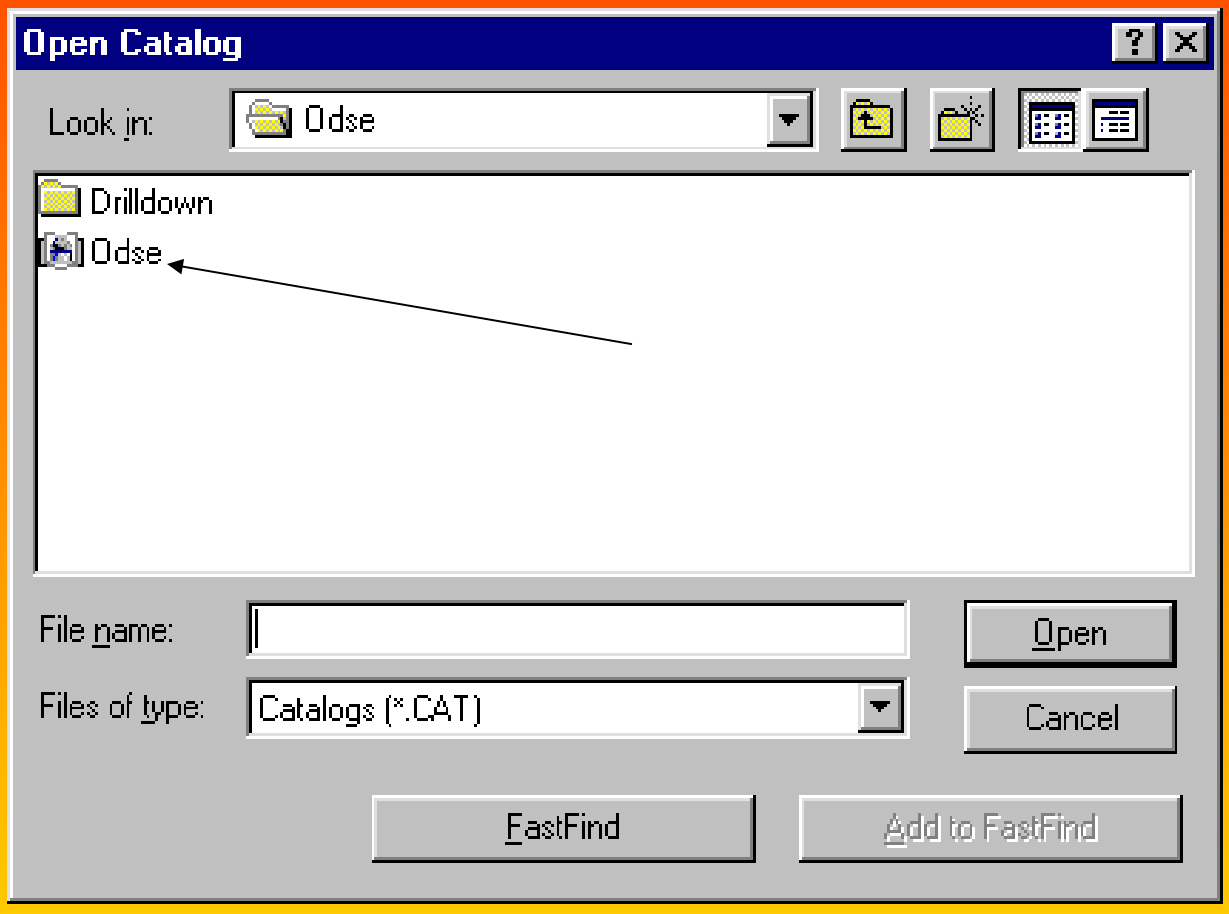


Your screen will look like this.



SIMPLE LIST is the default Fast Find within the NEW window box. REPORT is the default option for "create new" as well.

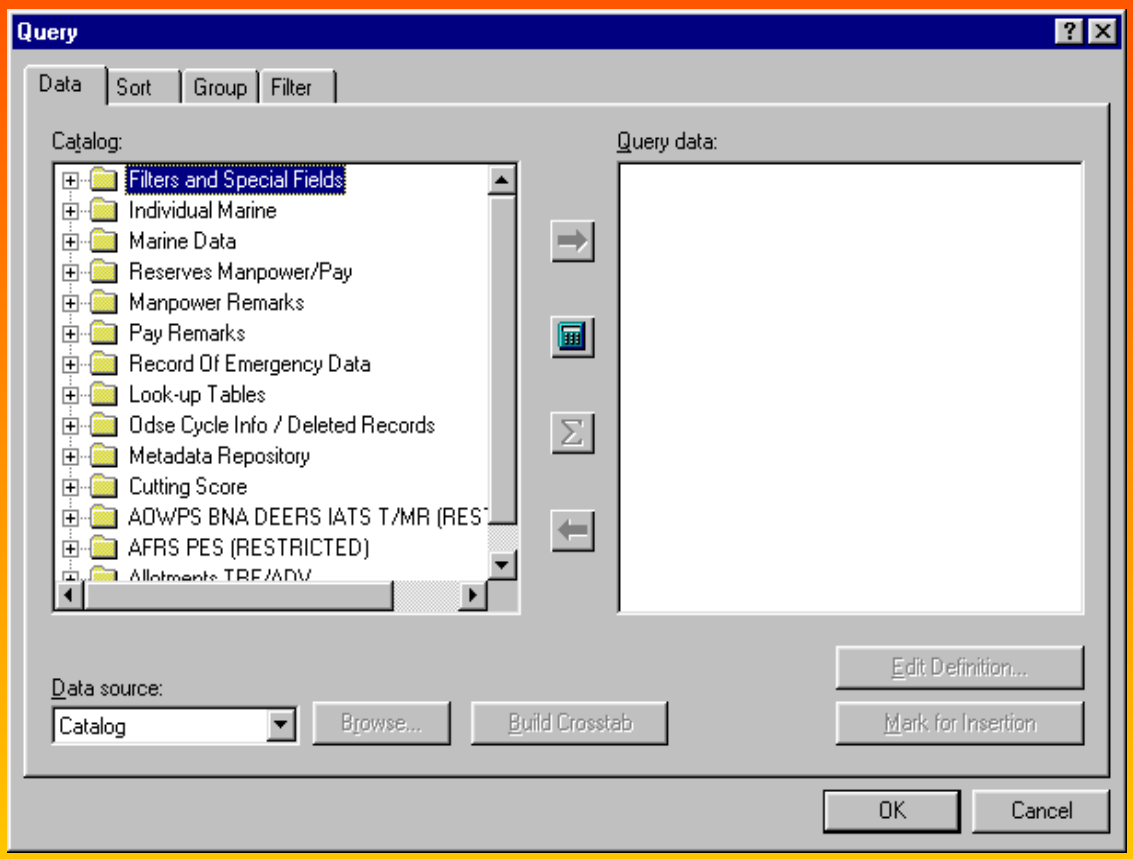
If you did not access ODSE through the START menu (ODSE catalog), you will now have to connect to the catalog here by click on ODSE and clicking OPEN. This will prompt you to enter your ID and password.



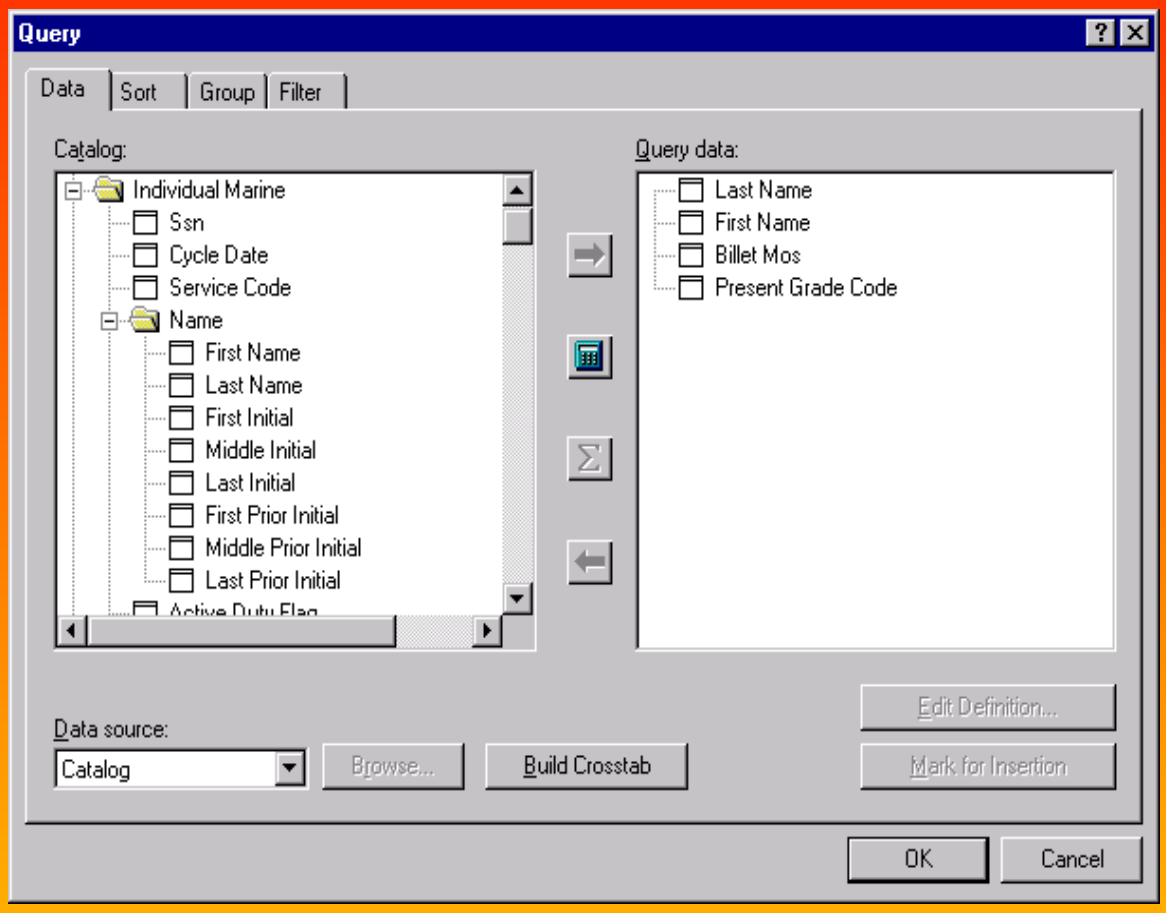
-If you are using UDMIPS, you will immediately go into the catalog.
-If you are using ODSE, you will be prompted to choose a catalog. If the ODSE catalog does not appear, it should be located in the C:\PROGRAM FILES \ COGNOS \ USERDATA\ ODSE sub-directory.

The query will appear. The query is broken into four basic tabs (DATA, SORT, GROUP, FILTER).

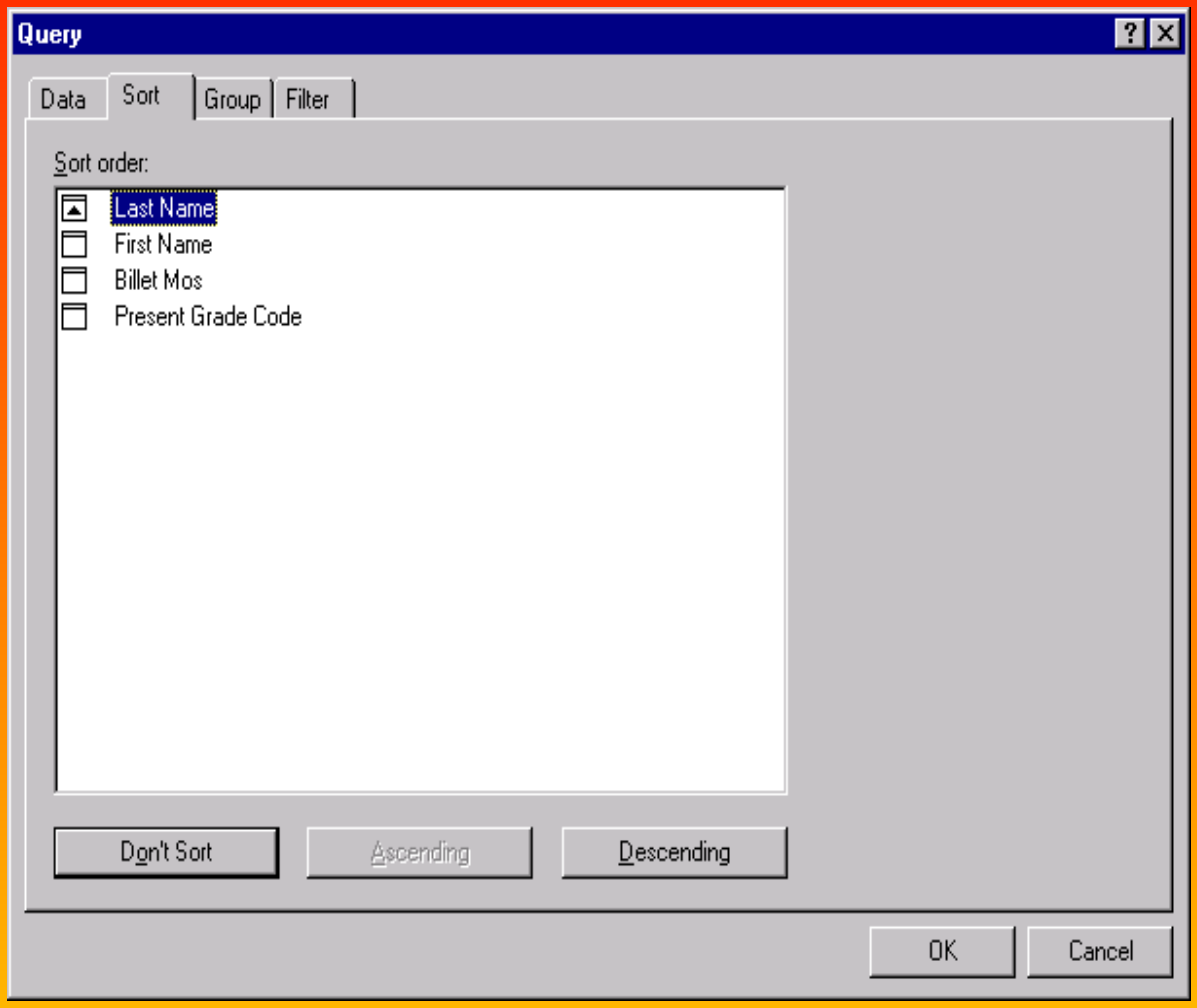
You are now in the query. Refer to your definition for qu



The DATA tab allows you to list what you want to appear on your report. To view the different data items available, click on the folder and scroll through them. (Utilize the ODSE Users Manual to locate the data item that you are trying to locate if you do not know where it is)

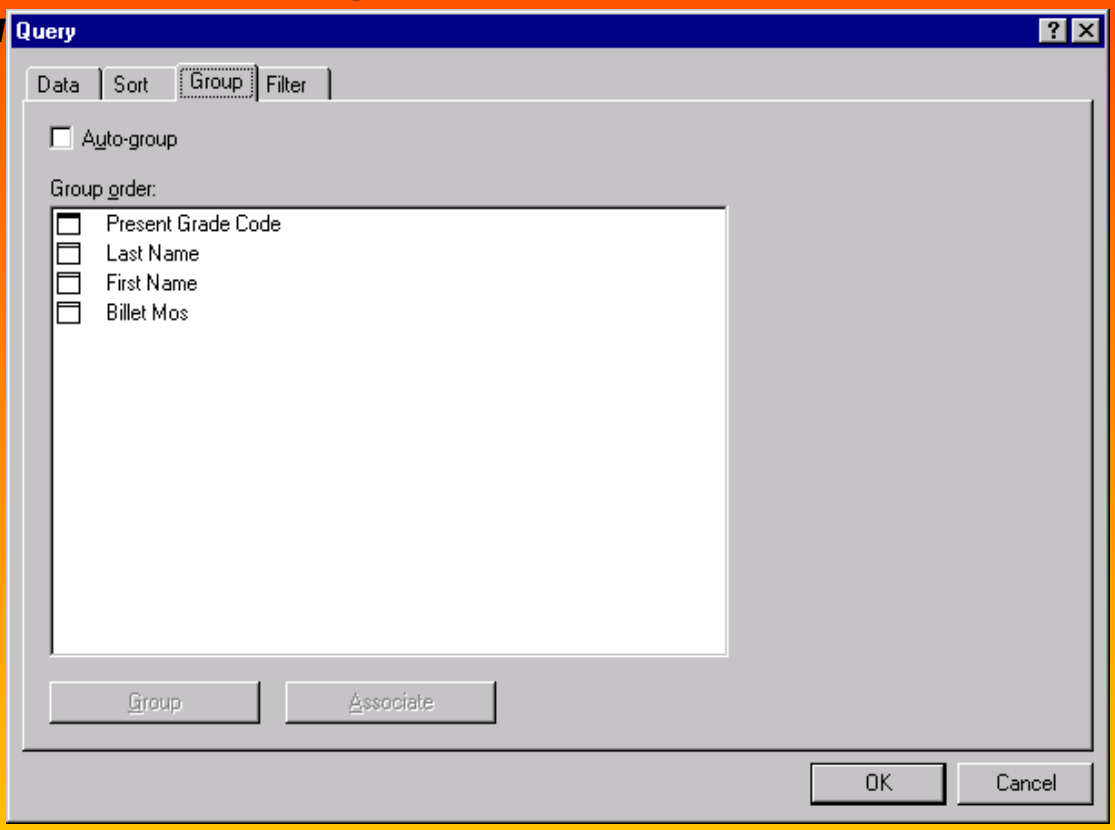


Once you have scrolled through and decided which data items you would like on your report, double click on the data item. This will move the data item into the QUERY DATA window. Once you have all the data items for your report listed in the QUERY DATA window, move on to the SORT tab by clicking on it.



All the data items from the QUERY DATA window will appear in the SORT tab. Double click on the data item(s) you want to sort by. It will move to the top of the list and a triangle will appear in the icon. Once you have your SORT order, click on the GROUP tab.

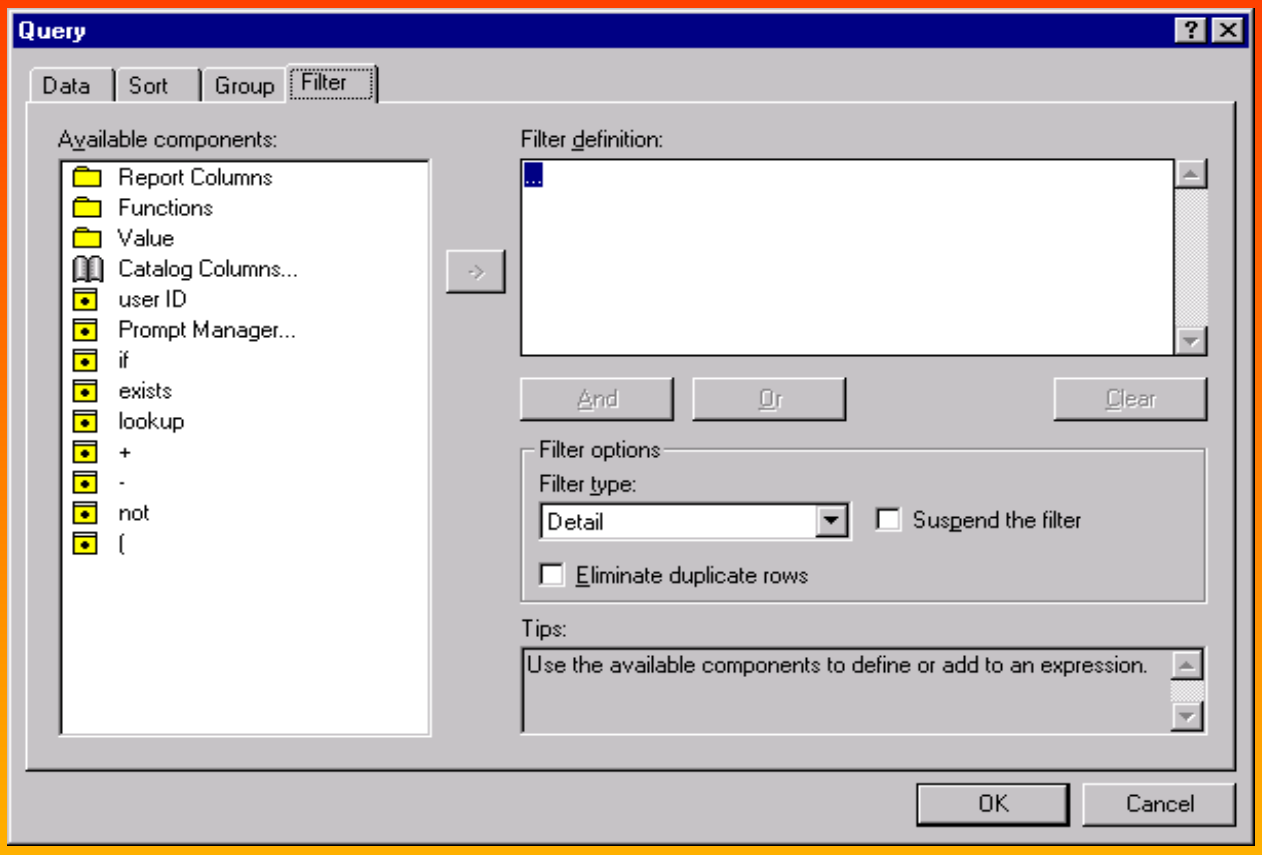
Groups can make the appearance of your data more organized and easier to understand. Look at the report in Chapter 8 for PersTempo and notice how the group makes the report easier to u



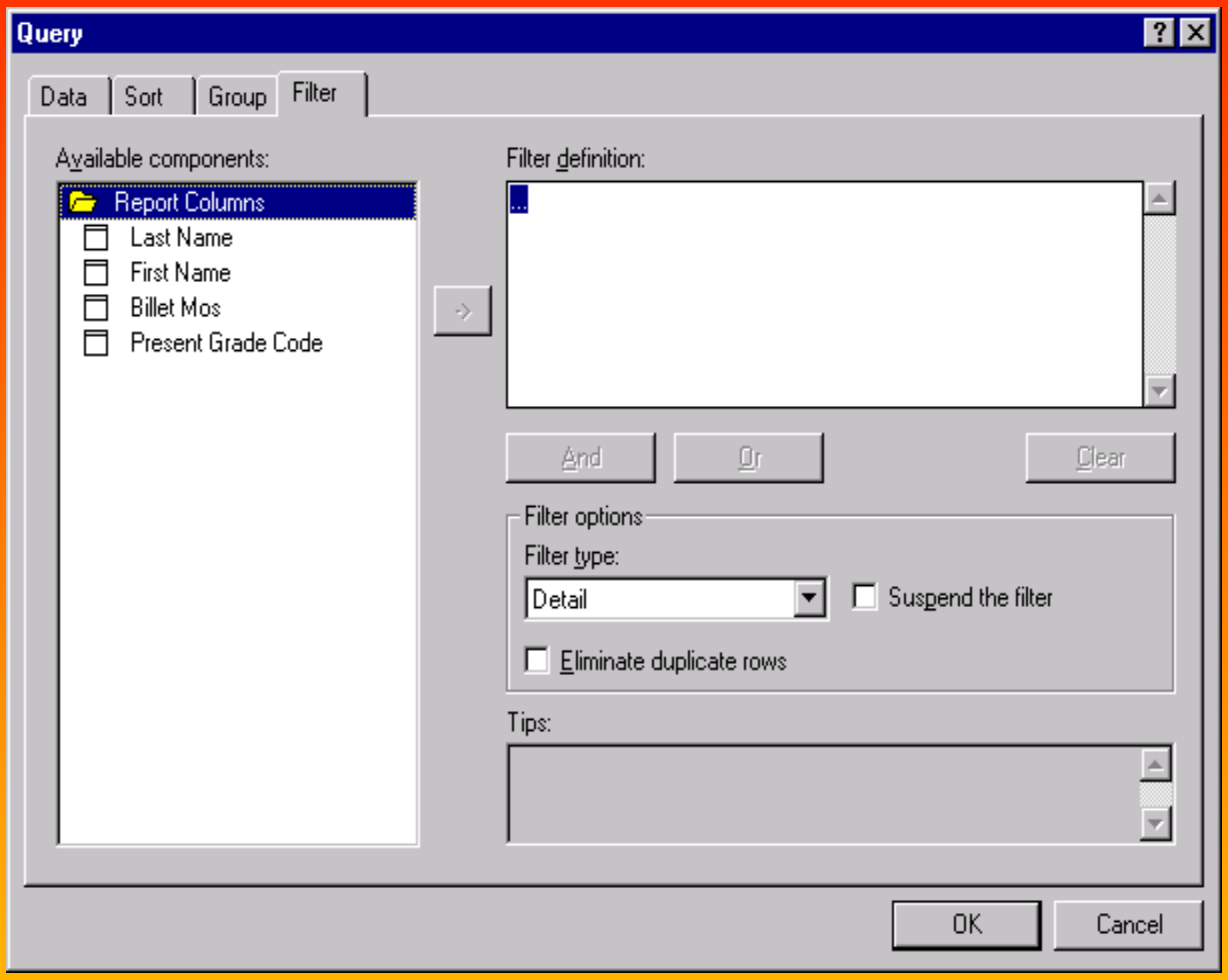
Double click on the data item(s) you want to group by. It will move to the top of the list and the icon next to the data item will have a bolded line across the top. *You do not have to GROUP*.

Now click on the filter tab.

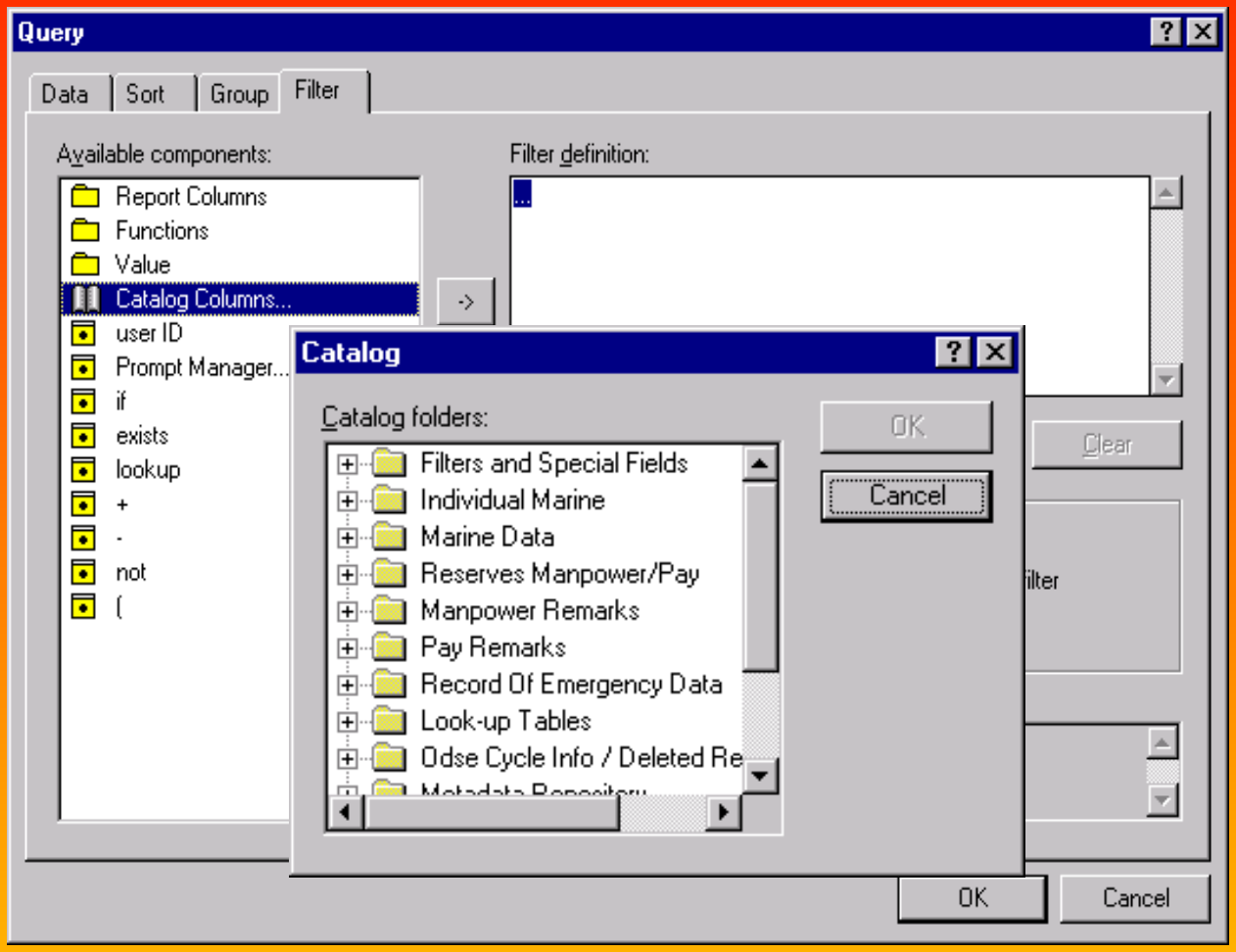
The FILTER is where you tell the program what it should produce.



There are several available components within the FILTER tab. For the purposes of this report we will look at REPORT COLUMNS AND CATALOG COLUMNS. Refer back to the definitions and expressions in chapter 3 for further clarifications. Also, look in Chapter 6 for other operators that can be used in the filter (example: functions).

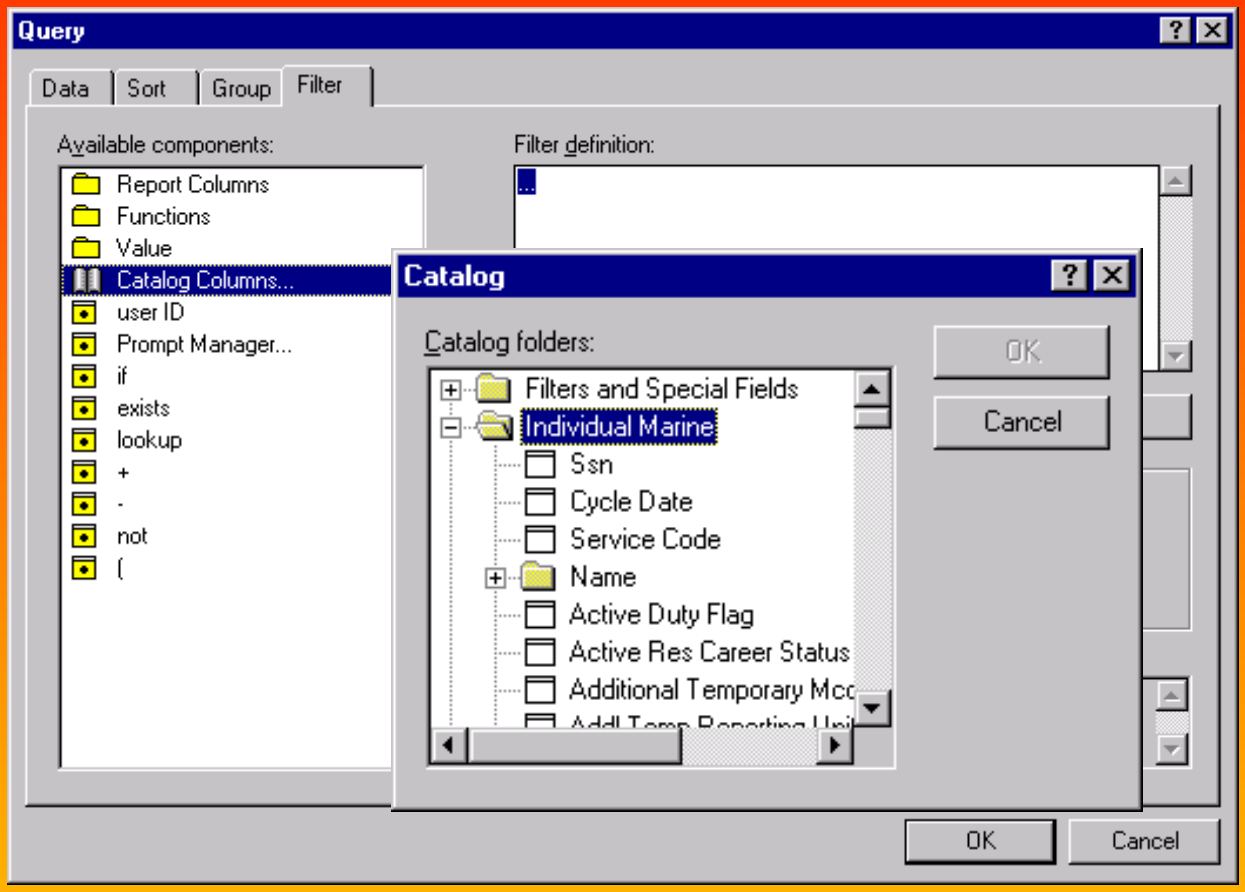


The REPORT COLUMNS will display all the data items that were requested in the DATA query.



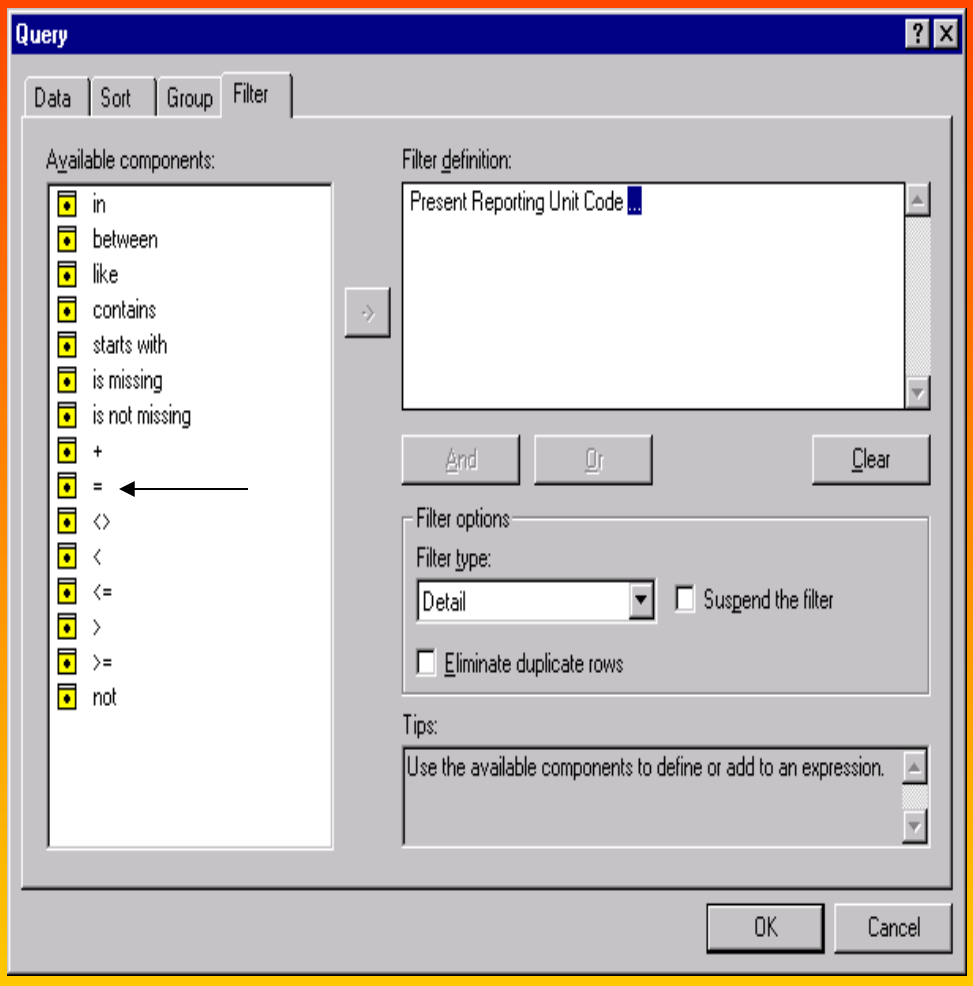
When you want to filter with a data item not listed in the data query, use Catalog Columns (a listing of the original folders).

Lets build a filter definition to get all the members within RUC 36000 that are SSgts.



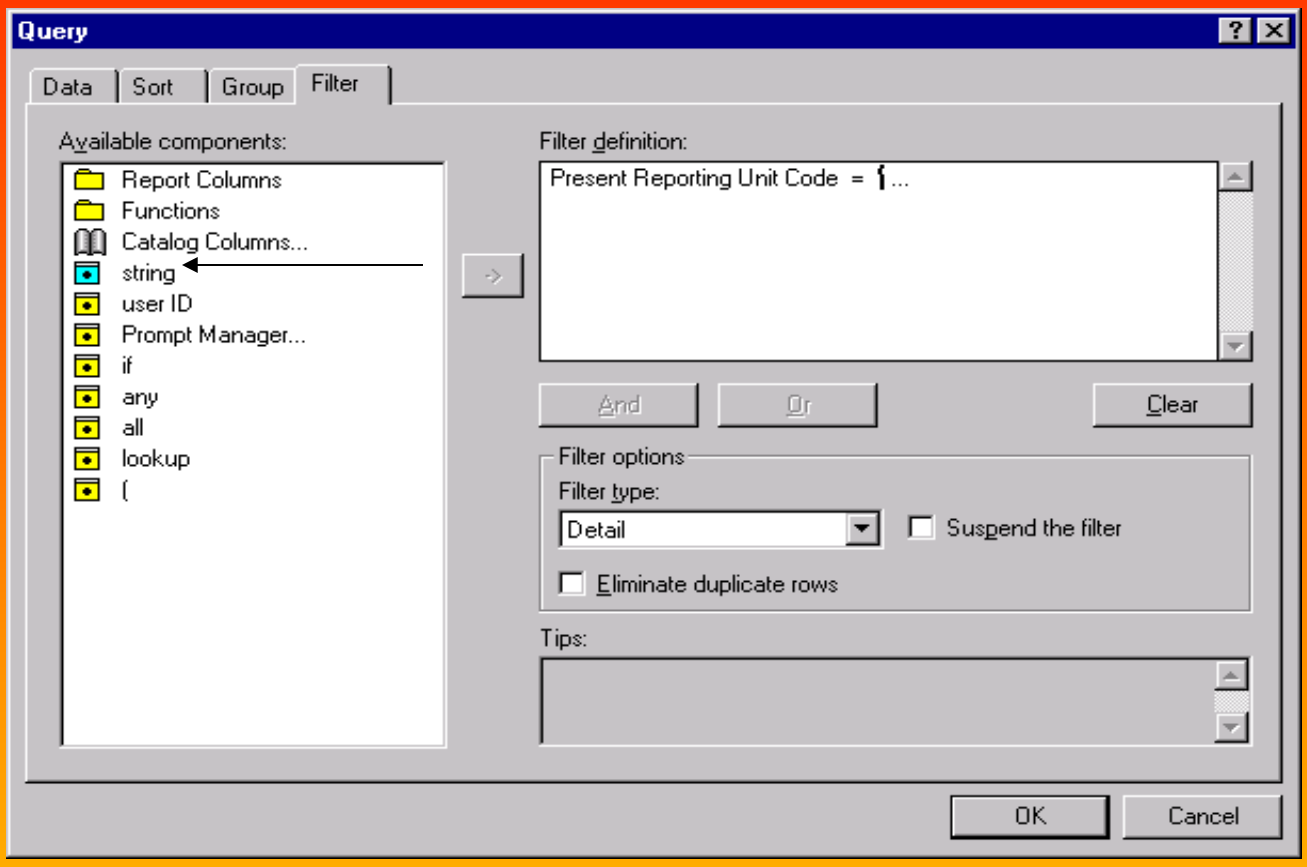
First we have to get the data item for **PRESENT REPORTING UNIT CODE**. If you look at Appendix B (ODSE Listing) and find the above data item, you will find that it is in the Individual Marine folder. Once you have opened the Individual Marine folder, scroll down and double click on PRESENT REPORTING UNIT CODE and it will move into the filter definition window.

The TIPS window gives you a definition of the component with you click on it.



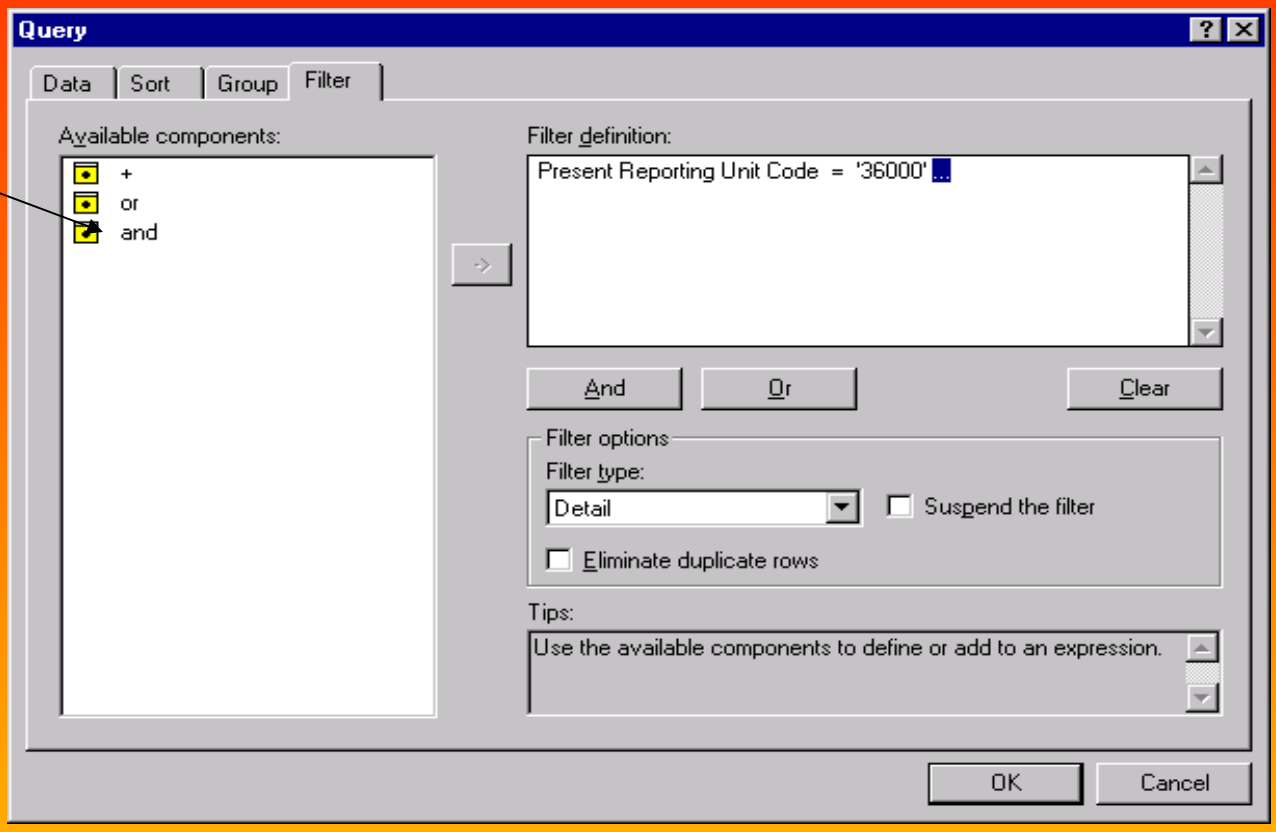
Now double click on equal to (=) and it will move to the filter definition window.

The string is often used when you want to input the data.



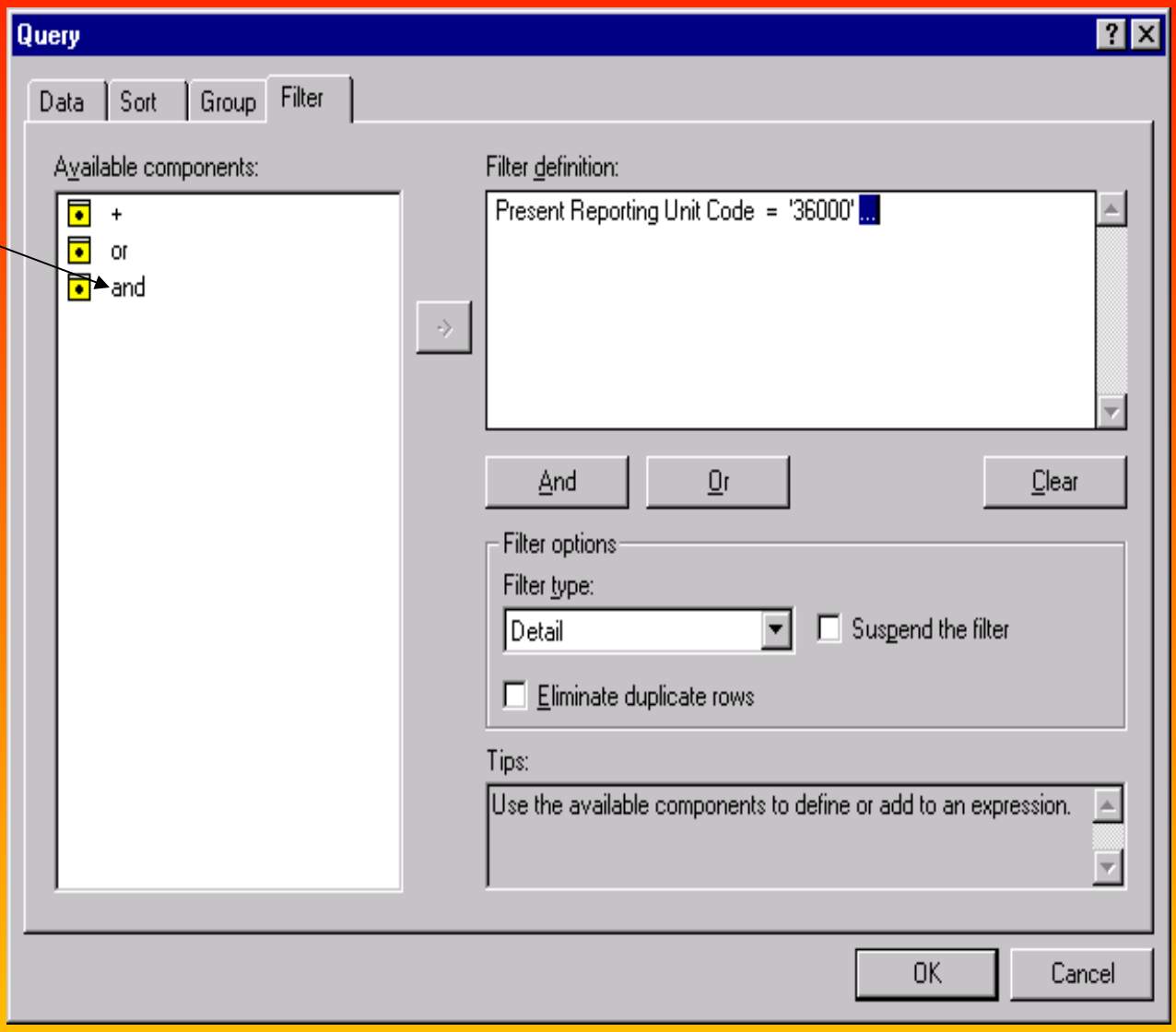
To input 36000, you must use a string. This is accomplished by double clicking on the string icon, under available component. This will put quotations inside your filter definition and the cursor will be blinking inside the string (quotation). Now type the information inside the string; in this case 36000. After it has been input, you can hit ENTER to get outside the string or hit the right arrow once to get outside the string.

AND is mostly used to connect expressions but **OR** can be used as well.

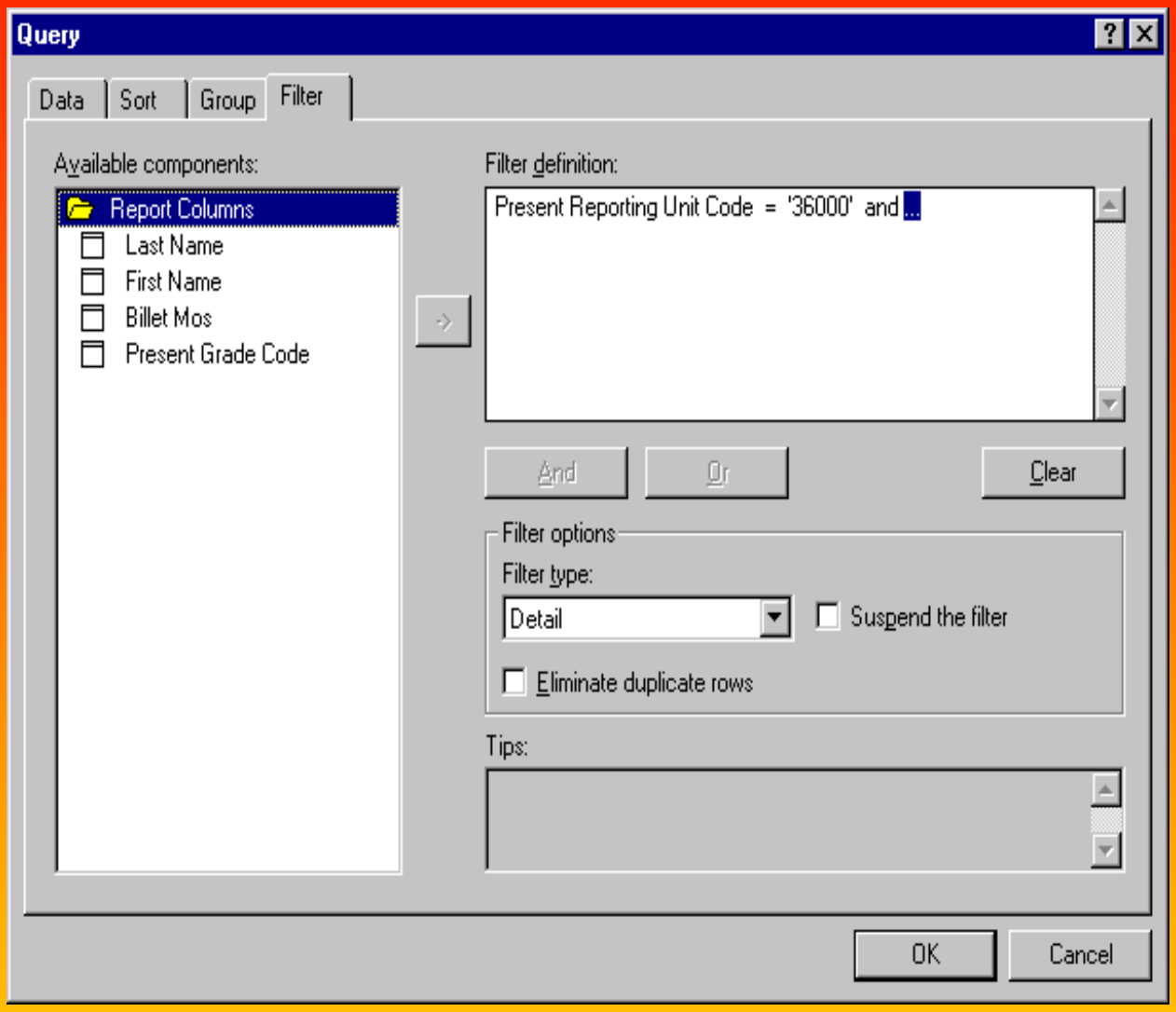


Your first expression should look like the one above.

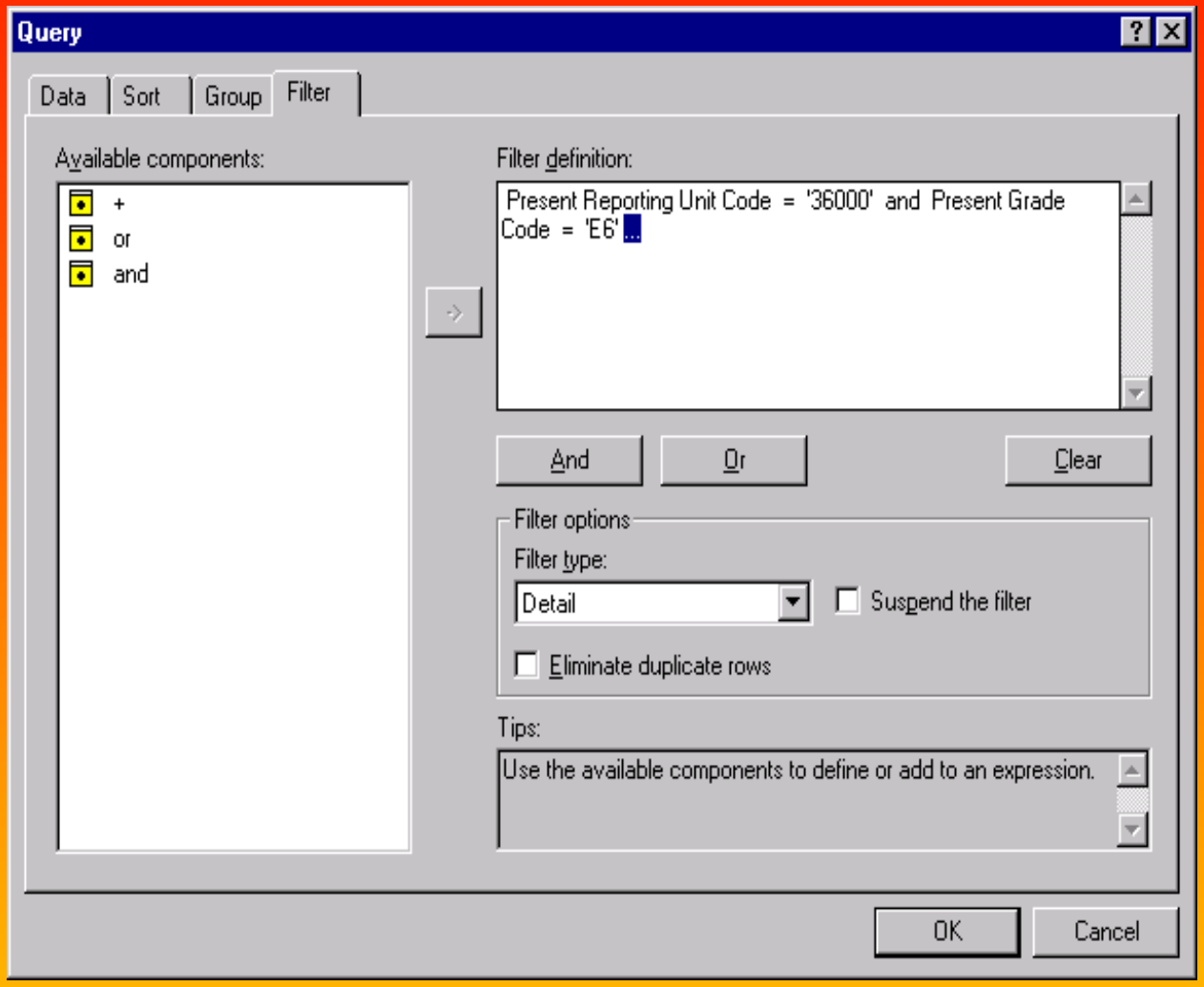
Because we have only the first part of our filter definition defined we have to add an expression connector operator before we can start the next expression. Double click on AND and lets start the next expression which will be to get all the Staff Sergeants.



Double click on AND before we can start the next expression.

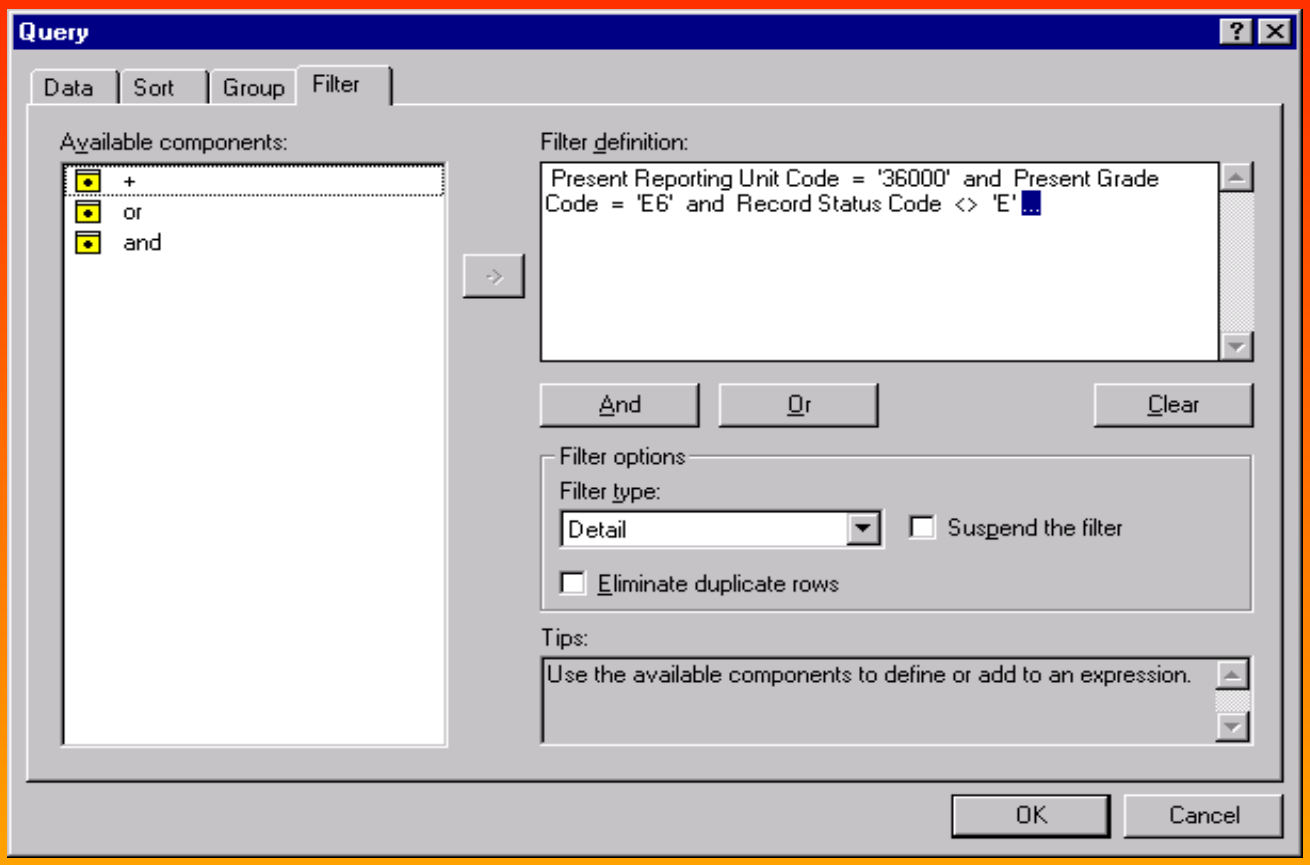


Go into the Report Columns and get Present Grade Code. When it moves to the Filter Definition, click on equal to (=) and then string and inside the string, type E6. Now right arrow over once to get outside the string.



Your filter definition should look like this. Now double click on AND to type your last expression.

CHECK ALL YOUR INFORMATION BEFORE PRESSING OK.



When in ODSE, the last expression is very important: **RECORD STATUS CODE < > 'E'**. This tells the program to look for all the Marines who are not in a separated status on the active duty side. This **will** include reservist on active duty. Do not choose COMPONENT CODE = '11' because it will exclude your officers that have not been augmented (C1 and C2). When you are completed with your filter, verify all your tabs for correctness and then click on OK.

REQUIRED FILTER ON ALL REPORTS

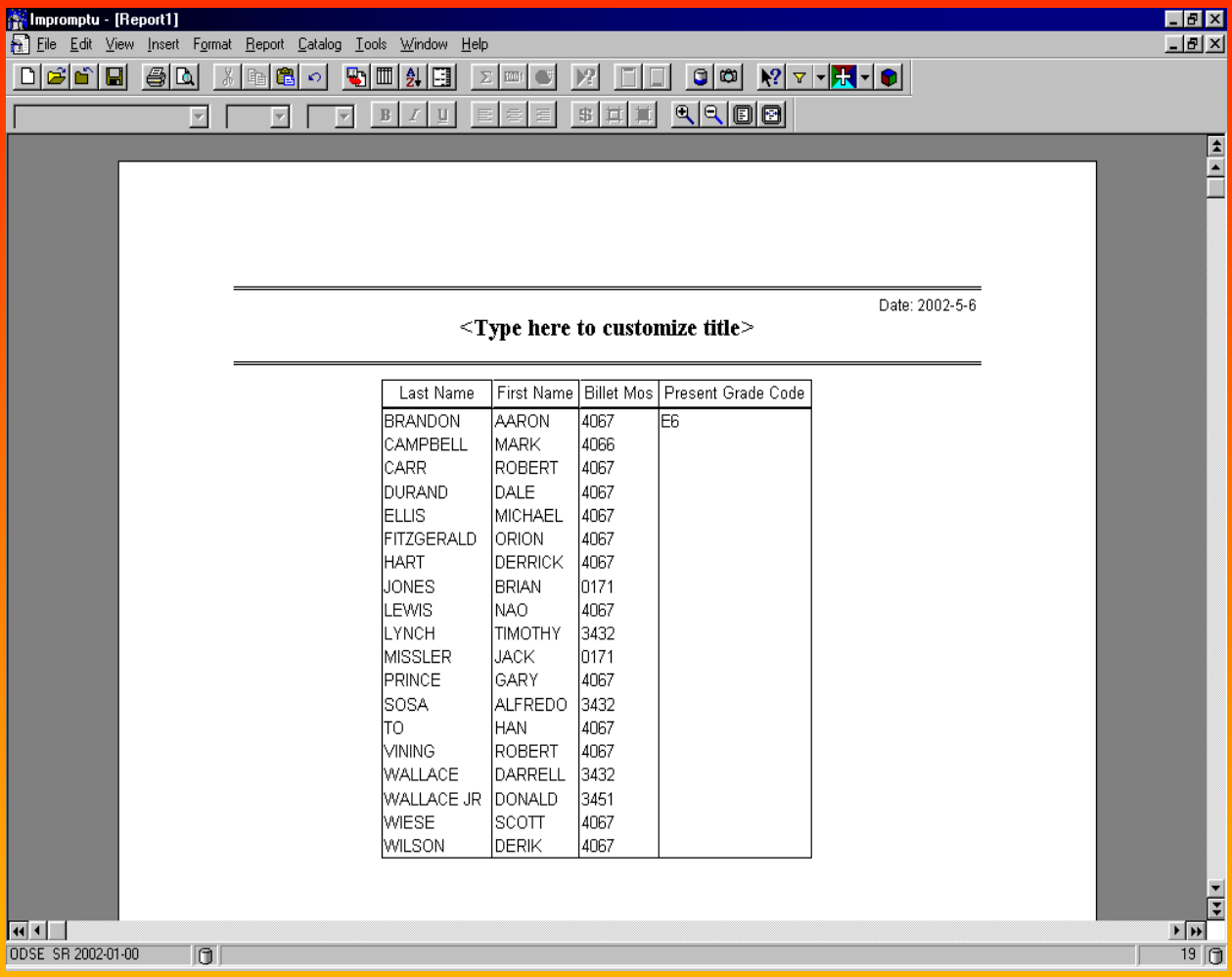
(Unless you what to see separated Marines)

On all active duty reports

Record Status Code <> ‘E’

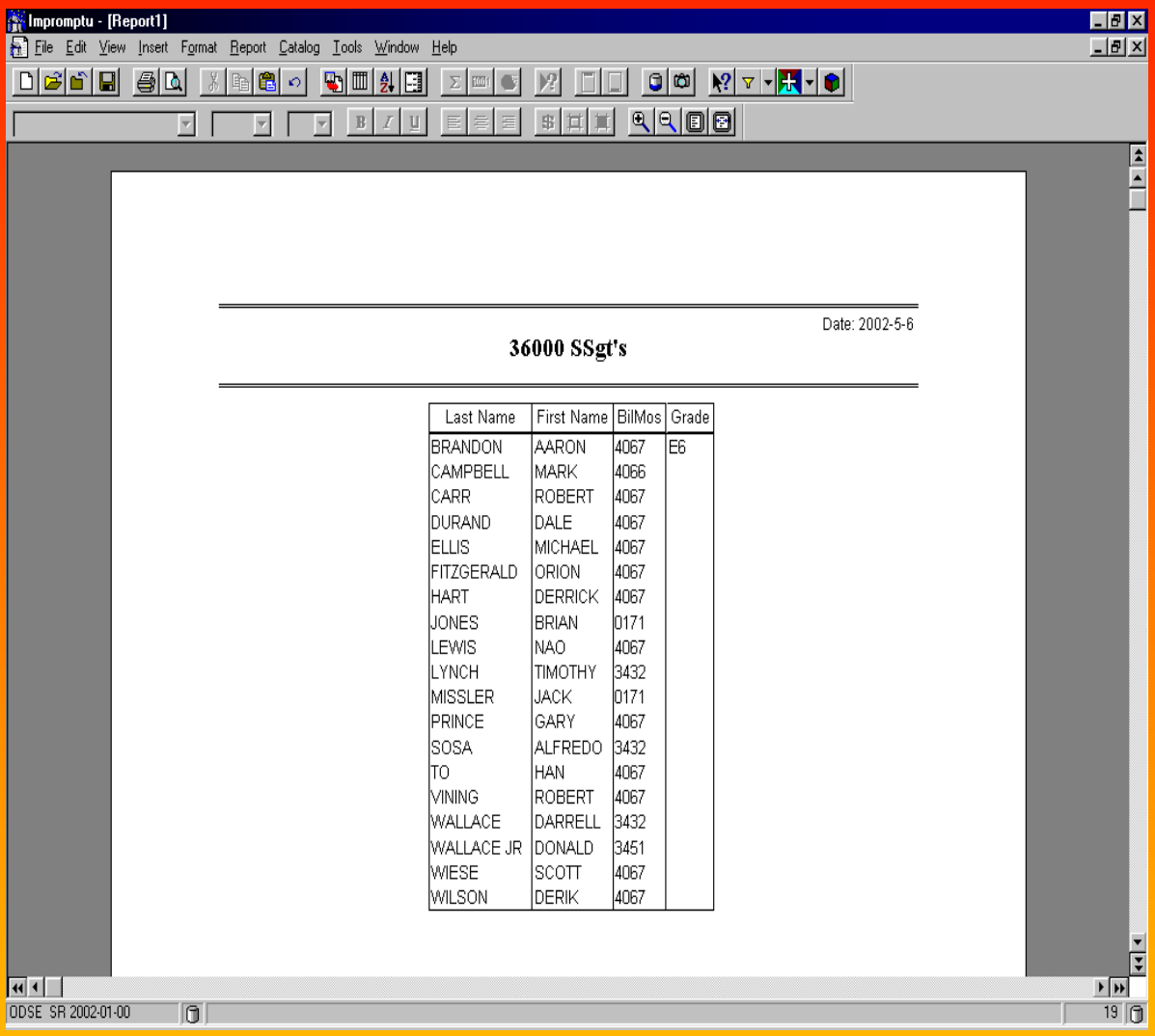
On all reserve reports

Reserve Record Status Code <> ‘9’



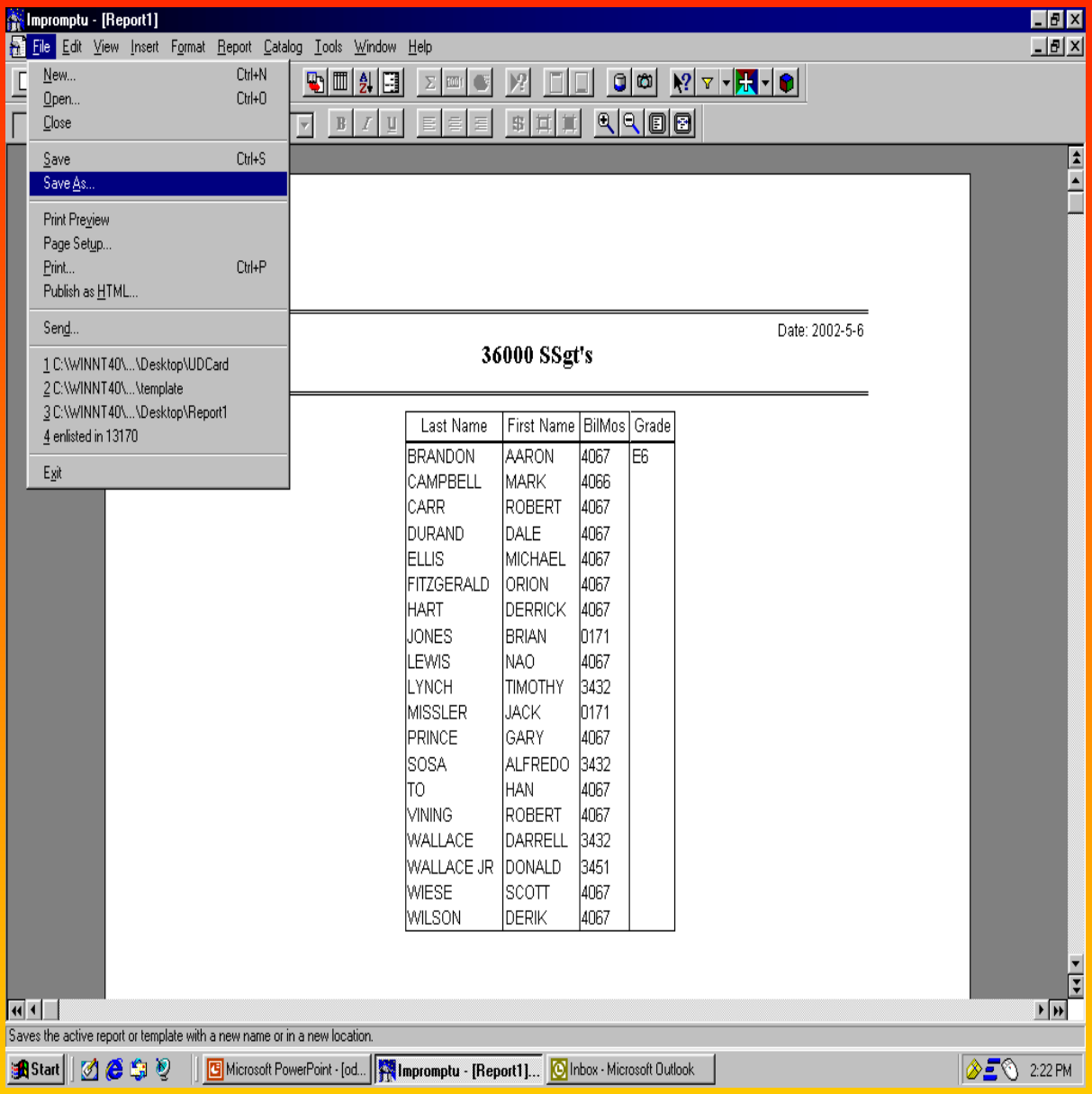
Last Name	First Name	Billet Mos	Present Grade Code
BRANDON	AARON	4067	E6
CAMPBELL	MARK	4066	
CARR	ROBERT	4067	
DURAND	DALE	4067	
ELLIS	MICHAEL	4067	
FITZGERALD	ORION	4067	
HART	DERRICK	4067	
JONES	BRIAN	0171	
LEWIS	NAO	4067	
LYNCH	TIMOTHY	3432	
MISSLER	JACK	0171	
PRINCE	GARY	4067	
SOSA	ALFREDO	3432	
TO	HAN	4067	
VINING	ROBERT	4067	
WALLACE	DARRELL	3432	
WALLACE JR	DONALD	3451	
WIESE	SCOTT	4067	
WILSON	DERIK	4067	

You will need to edit your report headers once your report is built. This is done by double clicking on the header you would like to change, EXAMPLE: Billet Mos could be changed to BilMos and Present Grade Code could be changed to Grade. Also, to give a title to your report, double click where it states “<Type here to customize title>” and type the desired title.

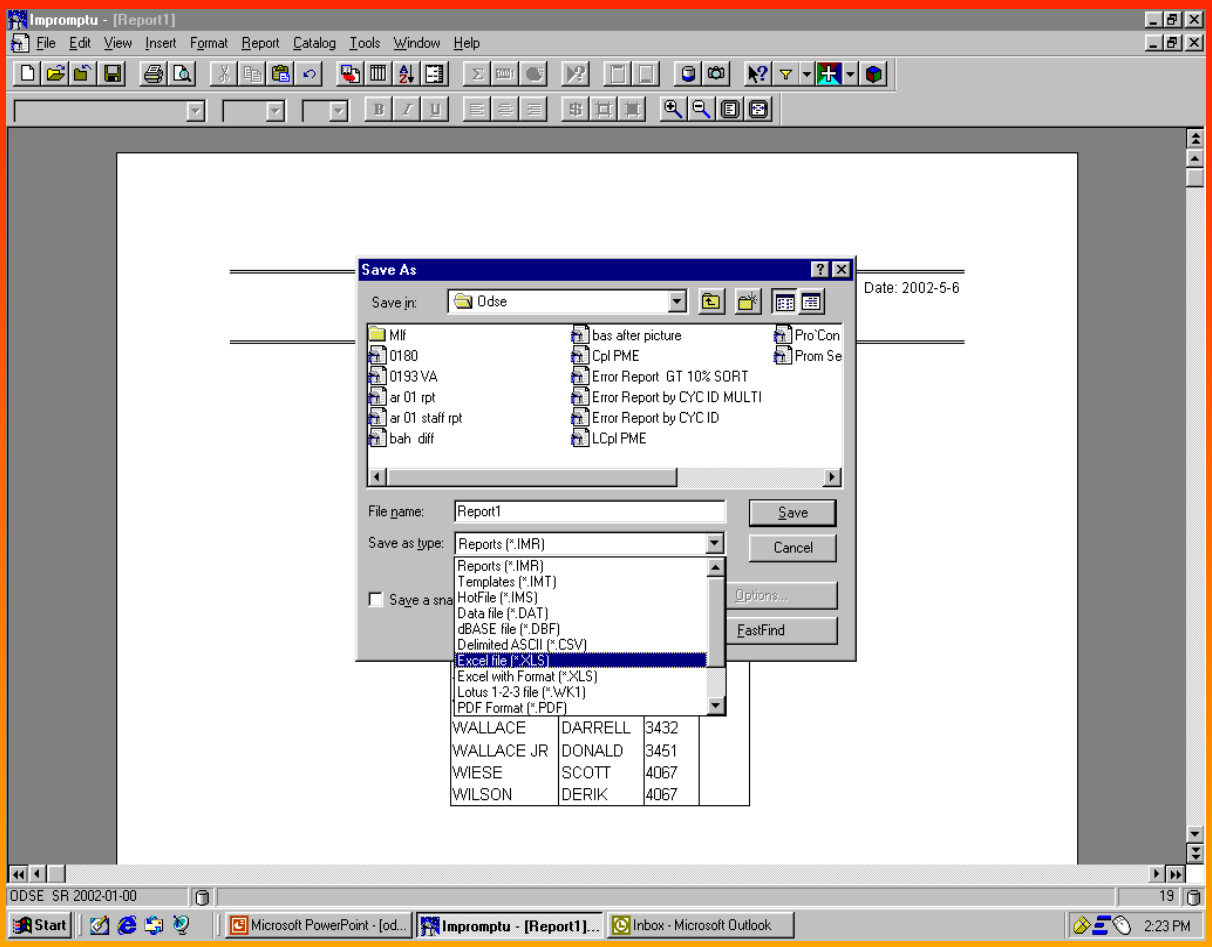


Last Name	First Name	BilMos	Grade
BRANDON	AARON	4067	E6
CAMPBELL	MARK	4066	
CARR	ROBERT	4067	
DURAND	DALE	4067	
ELLIS	MICHAEL	4067	
FITZGERALD	ORION	4067	
HART	DERRICK	4067	
JONES	BRIAN	0171	
LEWIS	NAO	4067	
LYNCH	TIMOTHY	3432	
MISSLER	JACK	0171	
PRINCE	GARY	4067	
SOSA	ALFREDO	3432	
TO	HAN	4067	
VINING	ROBERT	4067	
WALLACE	DARRELL	3432	
WALLACE JR	DONALD	3451	
WIESE	SCOTT	4067	
WILSON	DERIK	4067	

Your report should look similar to this. To delete a column from the report, place the cursor on any one of the retrieved data for the desired column and press the delete button or place the cursor on the header until the arrow is pointing down and click, it will high-light the entire column, then press delete button on your keyboard.



To save the report, simply click on FILE →SAVE AS



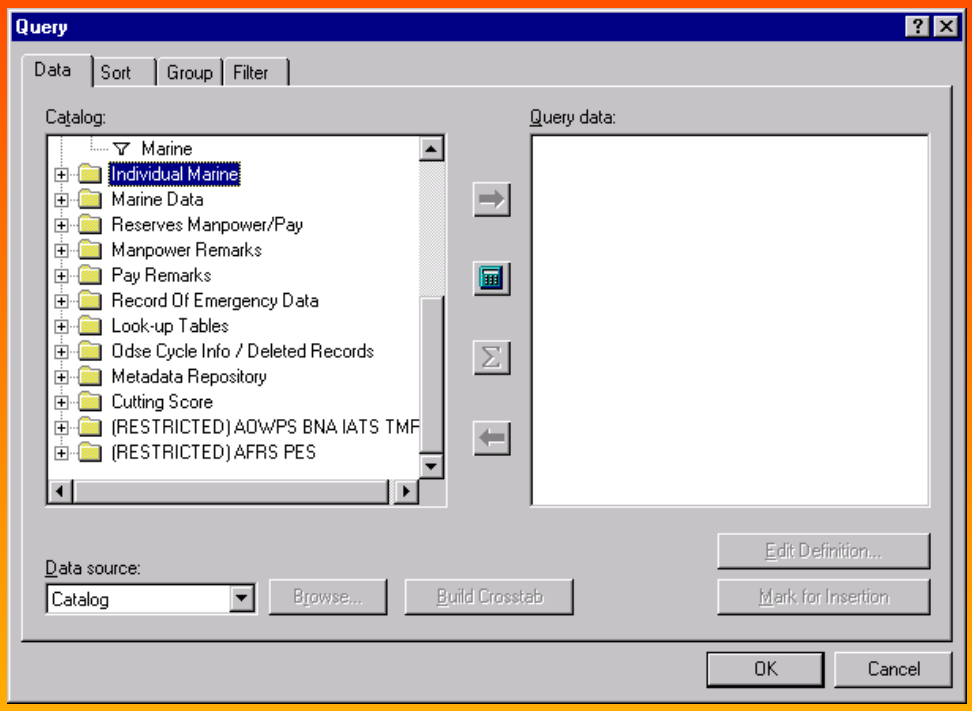
Give the report the desired name and now you have it for the next time someone request the same information. If you are sending the data to someone who does not have ODSE, change the "save as type" to MS excel or another type that can be accessed by that user.

Tip: If you have changed the header names for your report within Impromptu and want the new header names to appear in Excel, save as 'Excel with Format'.

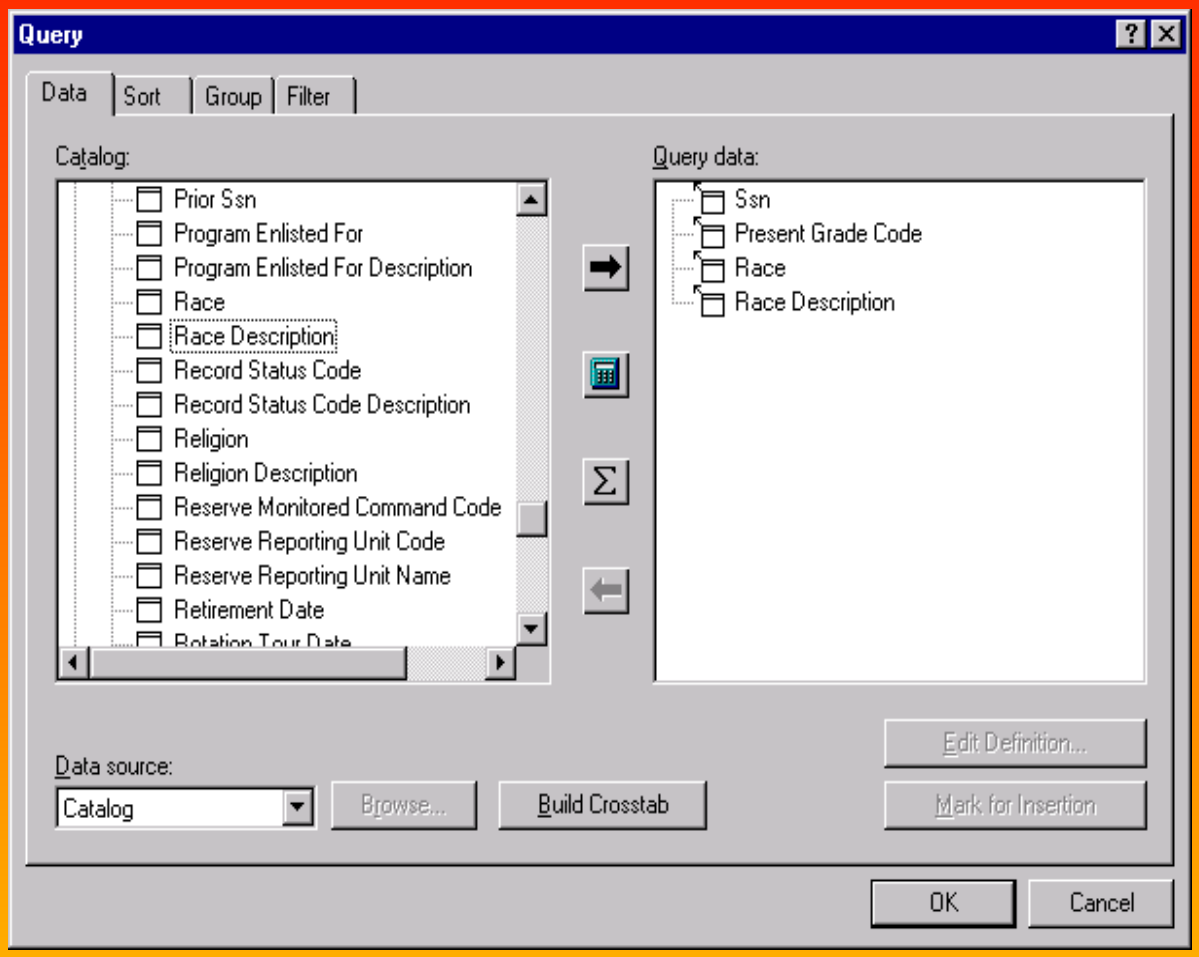
Chapter 5

Now that you know how to build a list report, lets look at cross tab reports, these are reports that provide numbers vice names.

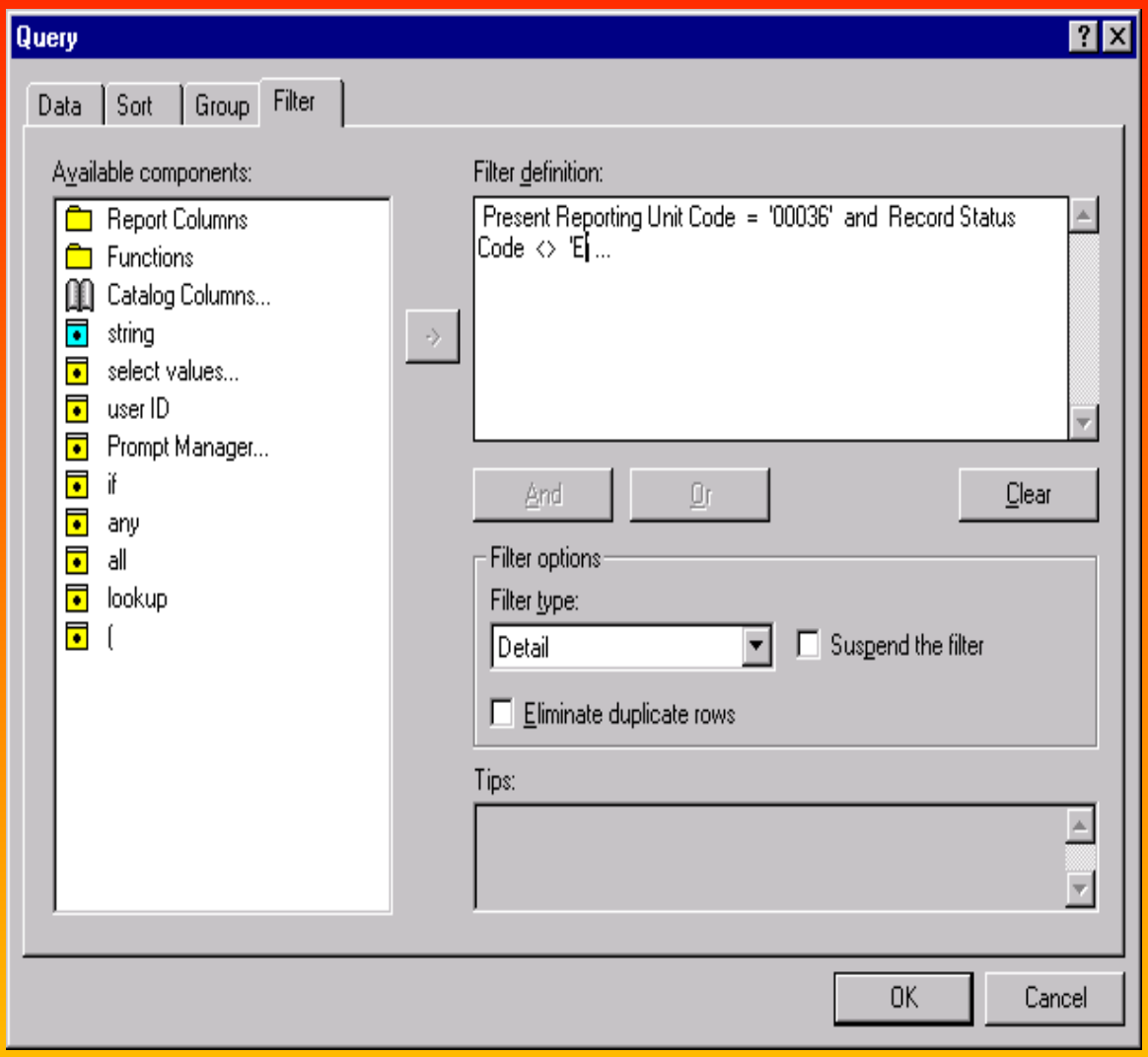
Lets build a report that shows a break down of personnel by grade and race for a specific RUC.



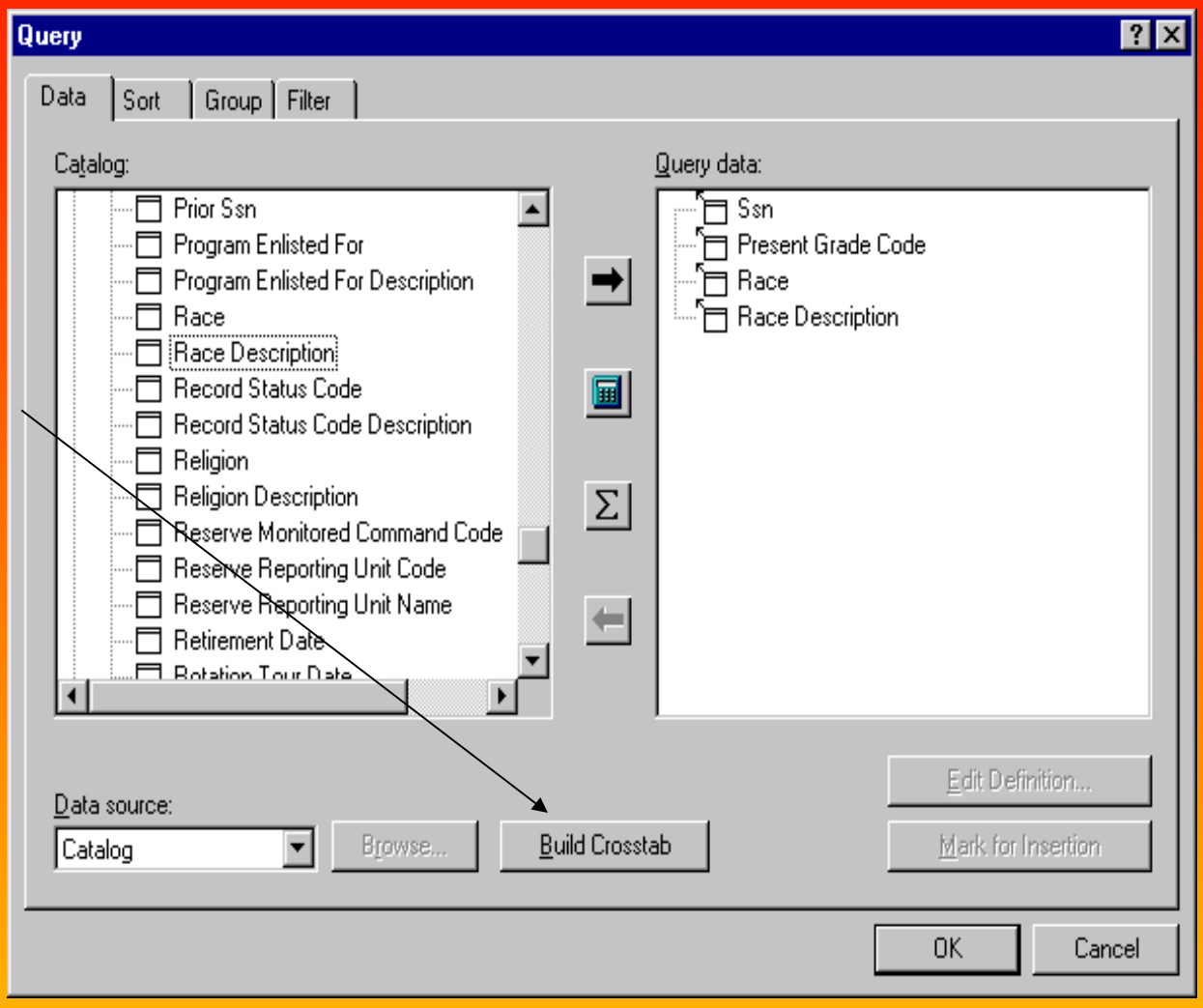
The Query is the same as with a LIST REPORT, in the data query you list the fields that you want displayed on the report.



Because all you want is numbers in a cross tab, you don’t need name fields, you always want to count by SSN. Of course list the other fields that you want to appear across the top (columns area) and the left side of the page (row area). There is no need to SORT or GROUP cross tabs.

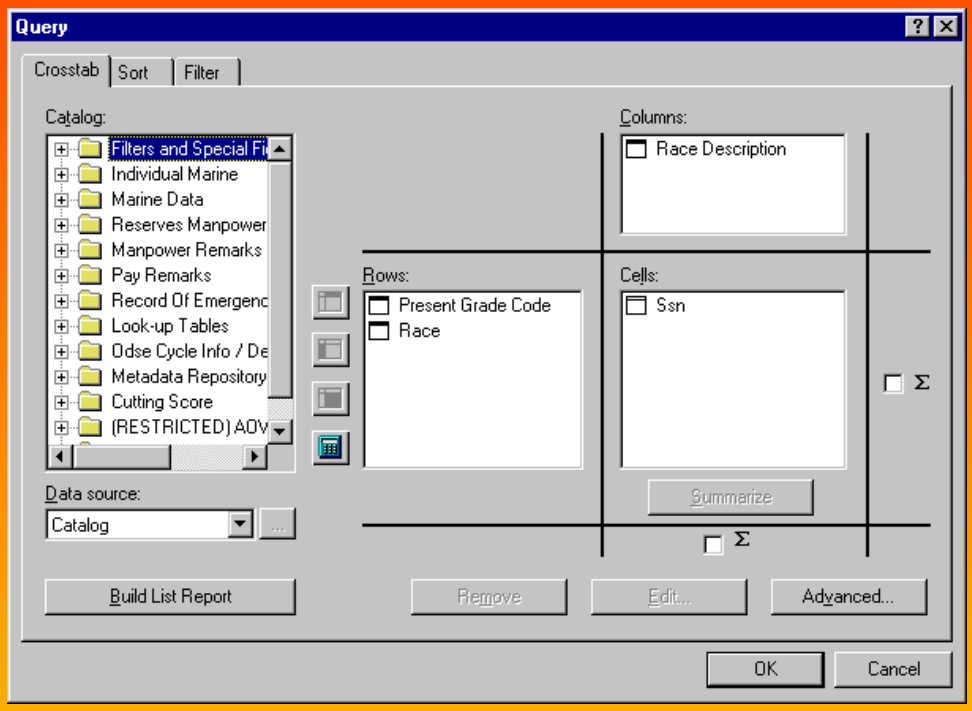


Inside the filter, state what you want the report to provide. Refer to the SIMPLE LIST REPORT if necessary.

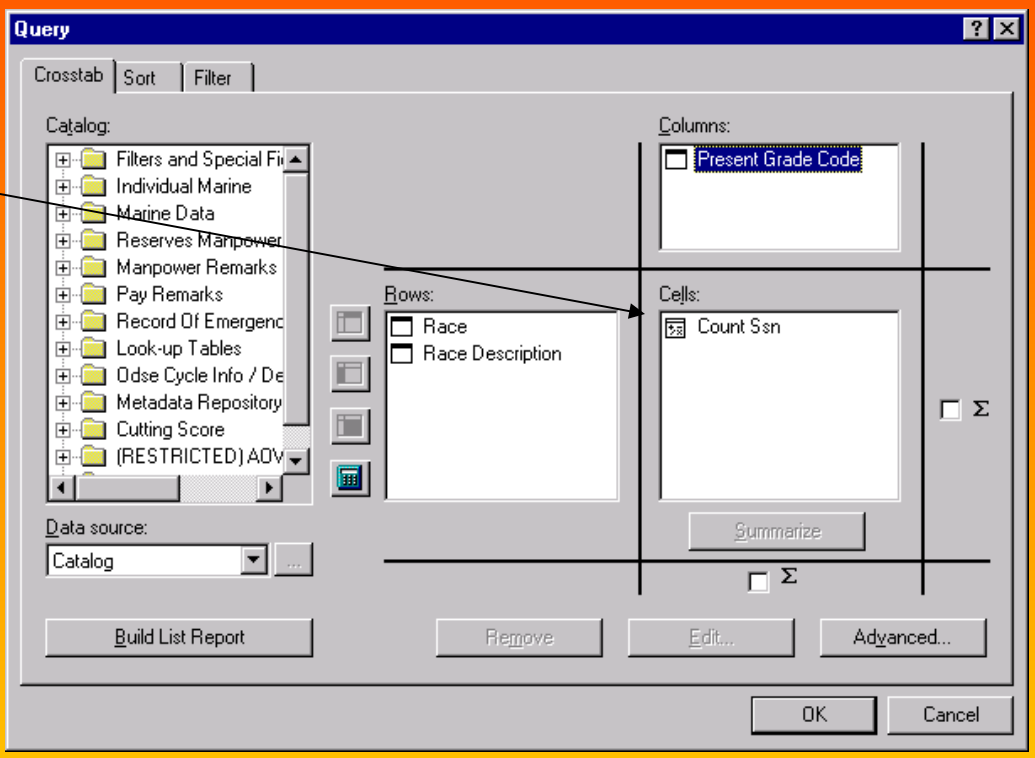


Once you are satisfied with the information you are requesting in the query of this report return to the data tab and click on the build crosstab button. **Sometimes it will take a few minutes to get the crosstabs screen.**

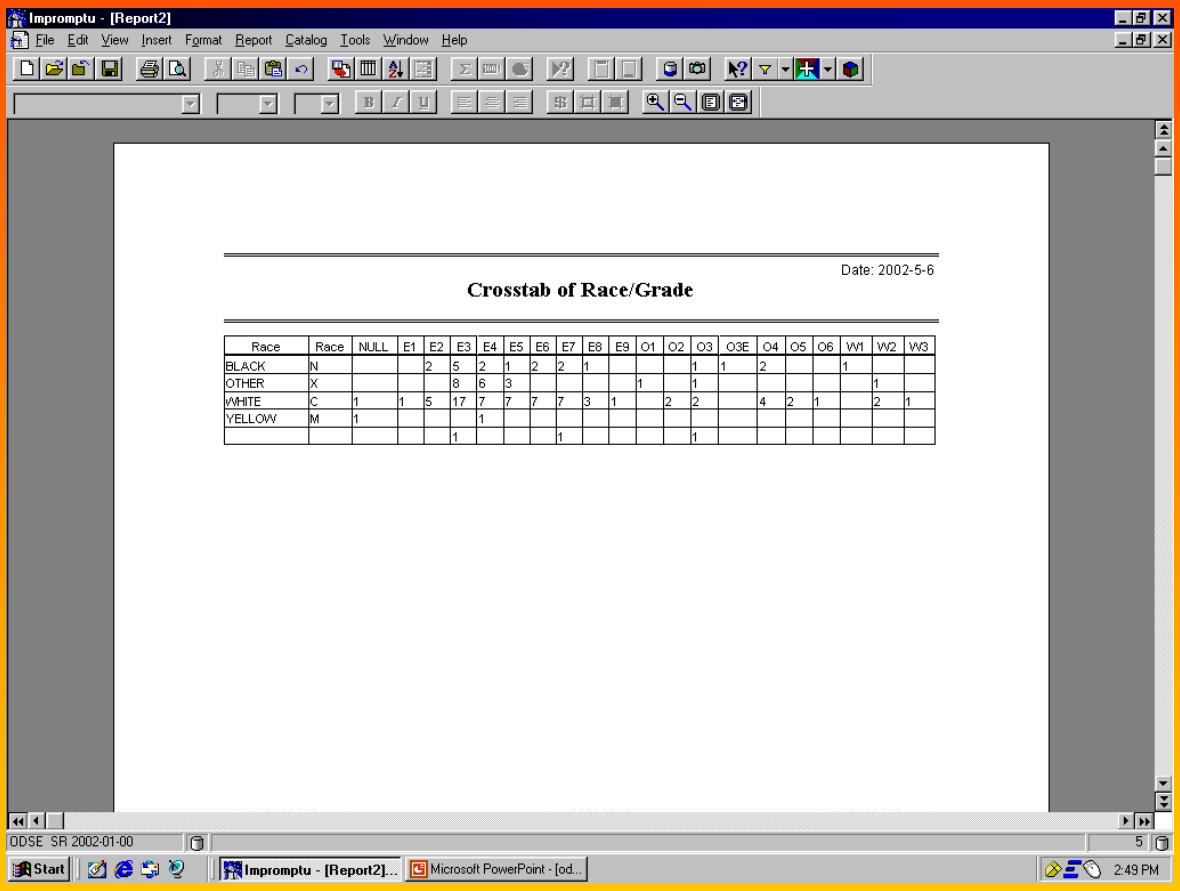
Once you have the screen in the correct format, click on OK.



When you get the crosstabs screen, the data may have to be arranged in the way that you would like it to appear on your report. **ALWAYS HAVE "Count SSN" IN THE CELL COLUMN**. This is because you want the program to do just that, Count the SSN. This is done by clicking and dragging the SSN data item into the cell area of the crosstab screen.

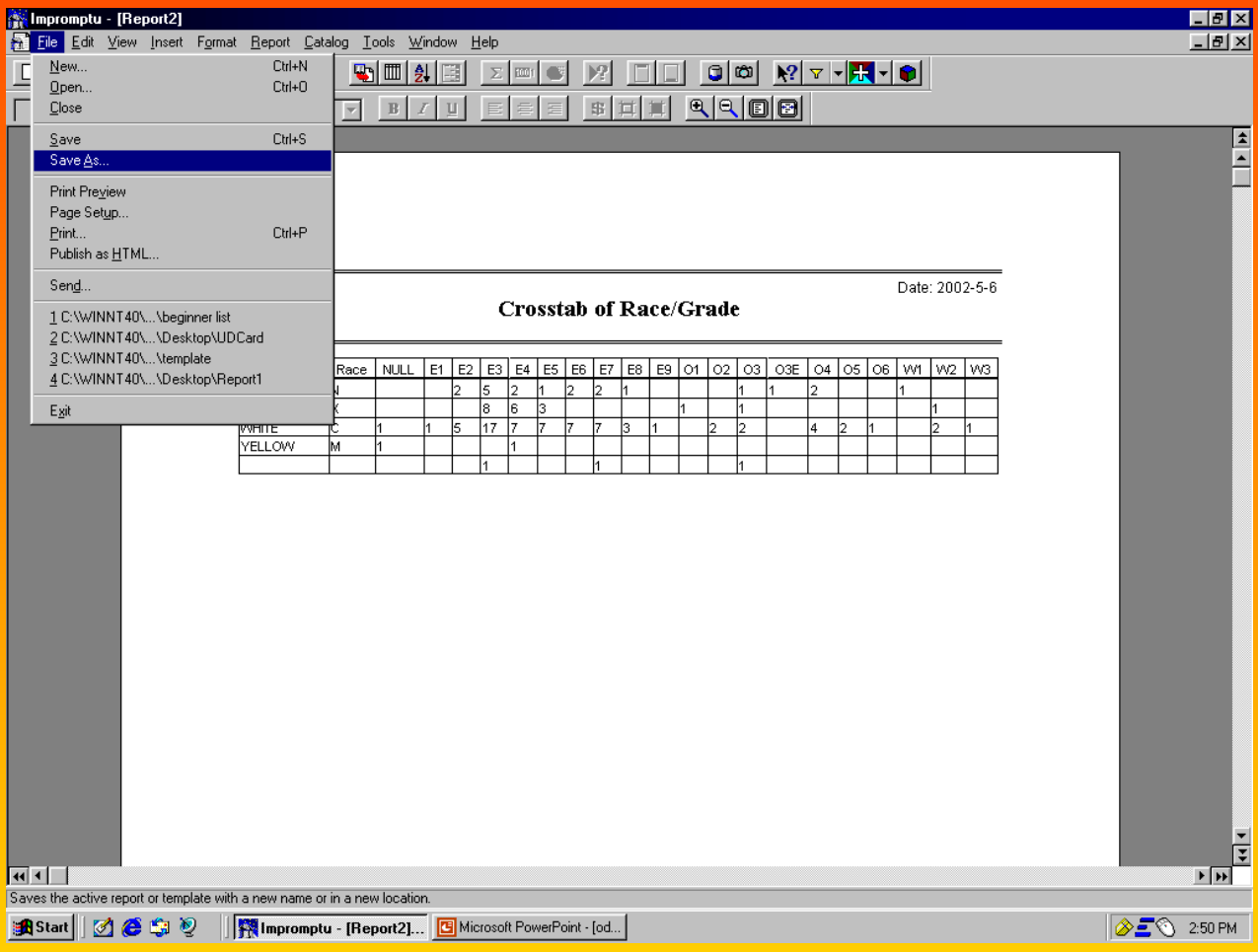


It should look like this. Notice the Count SSN vice SSN.



Race	Race	NULL	E1	E2	E3	E4	E5	E6	E7	E8	E9	O1	O2	O3	O3E	O4	O5	O6	W1	W2	W3
BLACK	N			2	5	2	1	2	2	1				1	1	2			1		
OTHER	X				8	6	3					1		1						1	
WHITE	C	1	1	5	17	7	7	7	7	3	1		2	2		4	2	1		2	1
YELLOW	M	1				1															
					1				1					1							

Now that you have your report, this is what it would look like after you have given it a title and made edits to the headers.



Now save your report.

The next time you need the data, simply access the file and it will be updated with the latest information.

Chapter 6

Building Calculated Data Items

Chapter 6

Building Calculated Data Items

You can use calculations to compare or combine data items or to summarize information.

Lets build a couple of calculations together.

-The first will simply merge data.

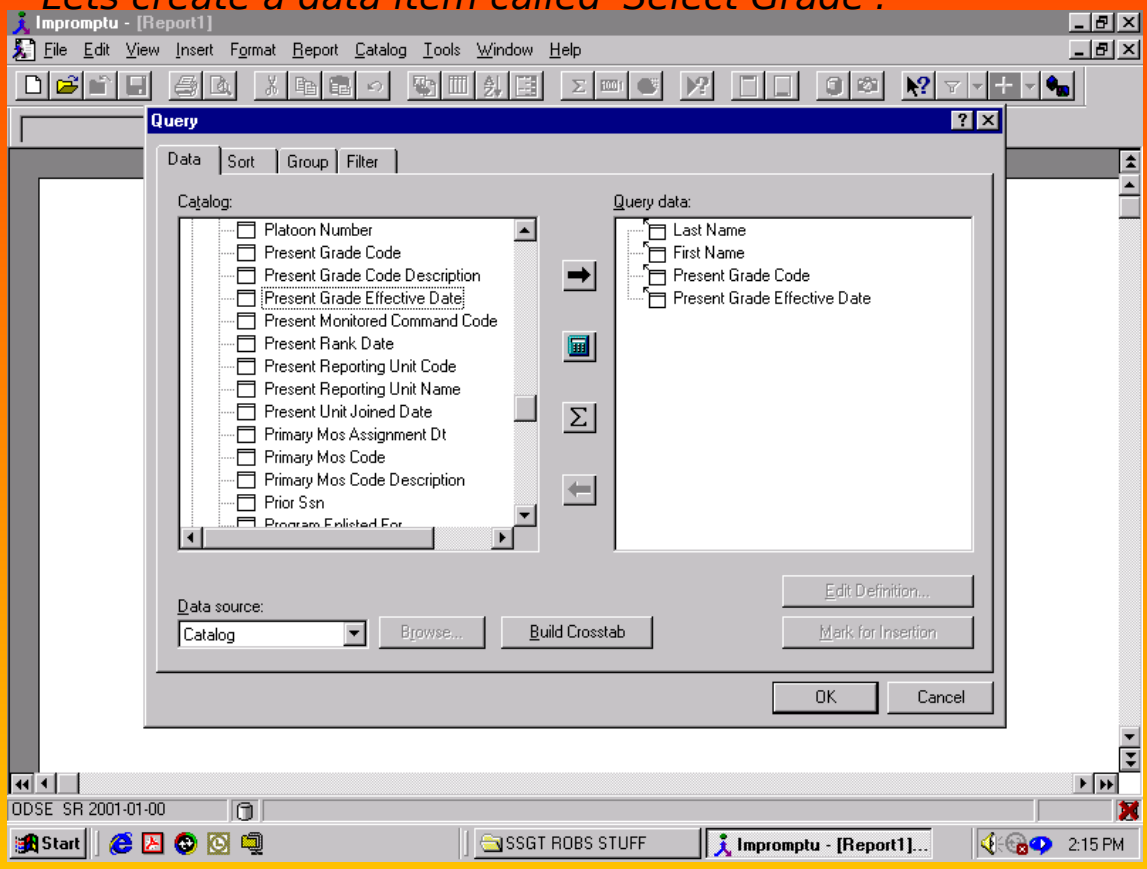
-The second will merge a summary/function with a data item to create a running total.

-The third will be a function that changes the database then does mathematics based of the data.

Chapter 6

Building Calculated Data Items

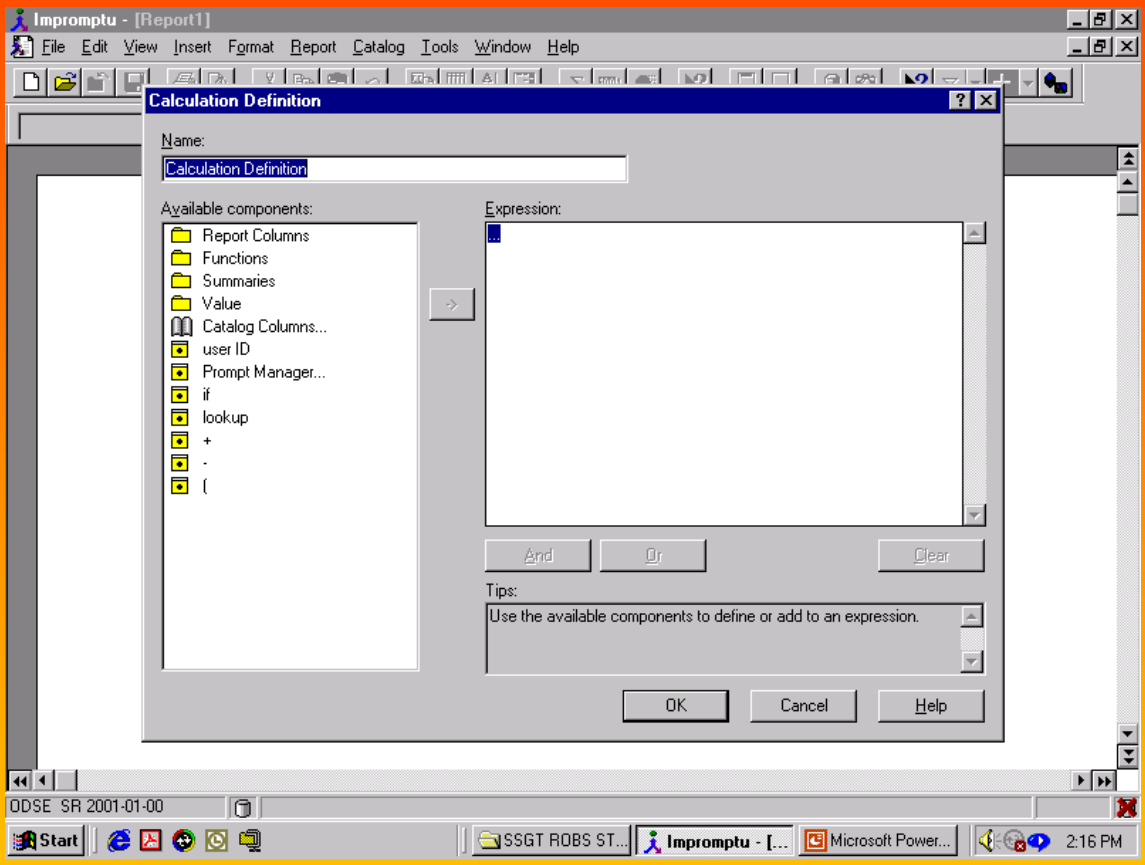
Lets create a data item called 'Select Grade'.



Within the data tab, select your data items as usual. When you are ready to build your calculation, click on the green calculator in the middle of the data tab window.

Chapter 6

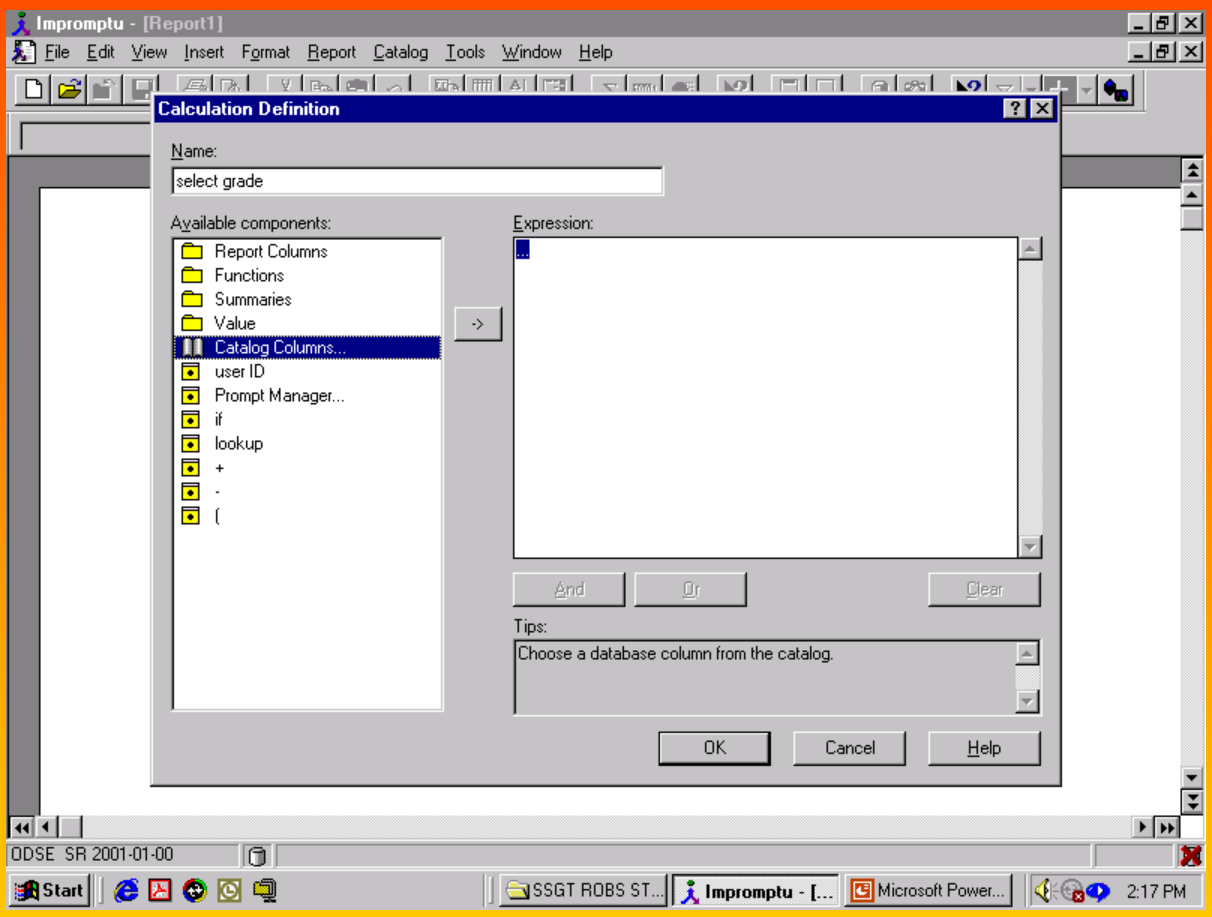
Building Calculated Data Items



When the calculation definition window appears, the cursor will be blinking in the Name box. Give your calculation a name. In the expression box, define your express by inputting the information you would like to merge.

Chapter 6

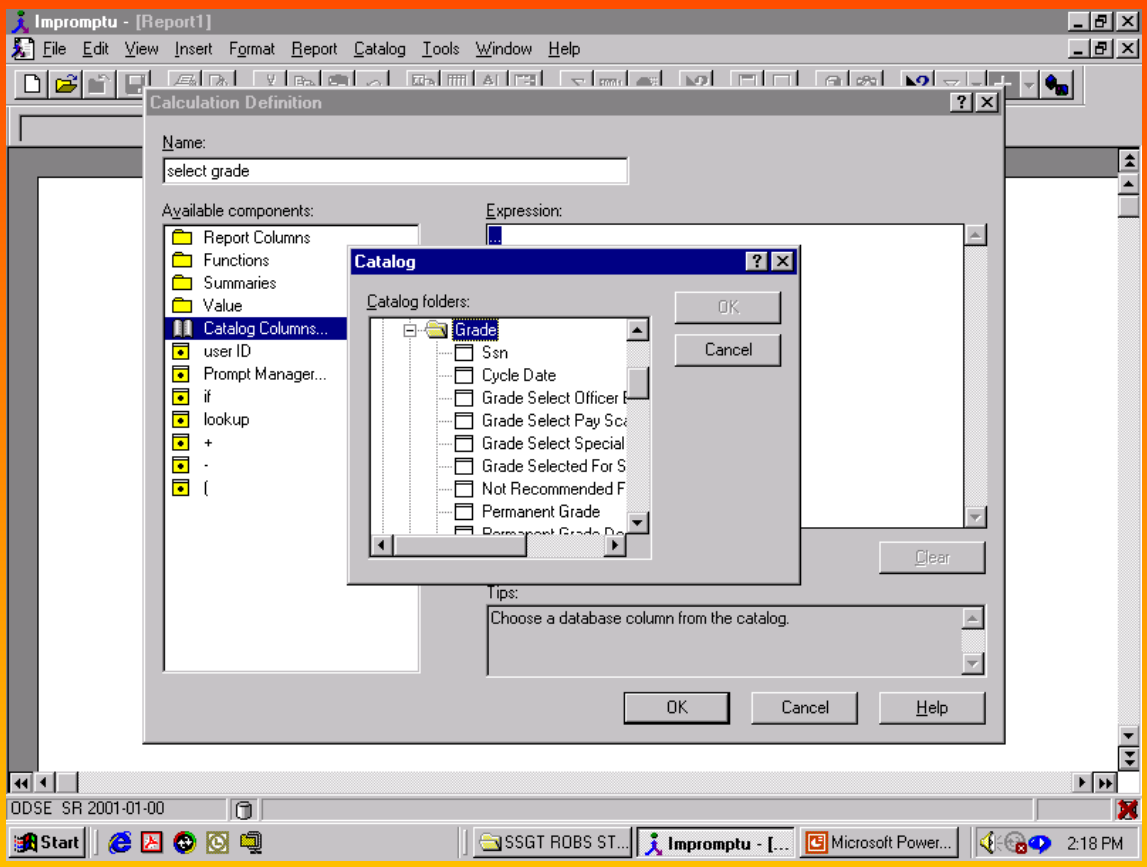
Building Calculated Data Items



To get to the GRADE SELECT OFFICER ENLISTED and GRADE SELECT PAY SCALE, go the Catalog Columns then Marine Data, then GRADE.

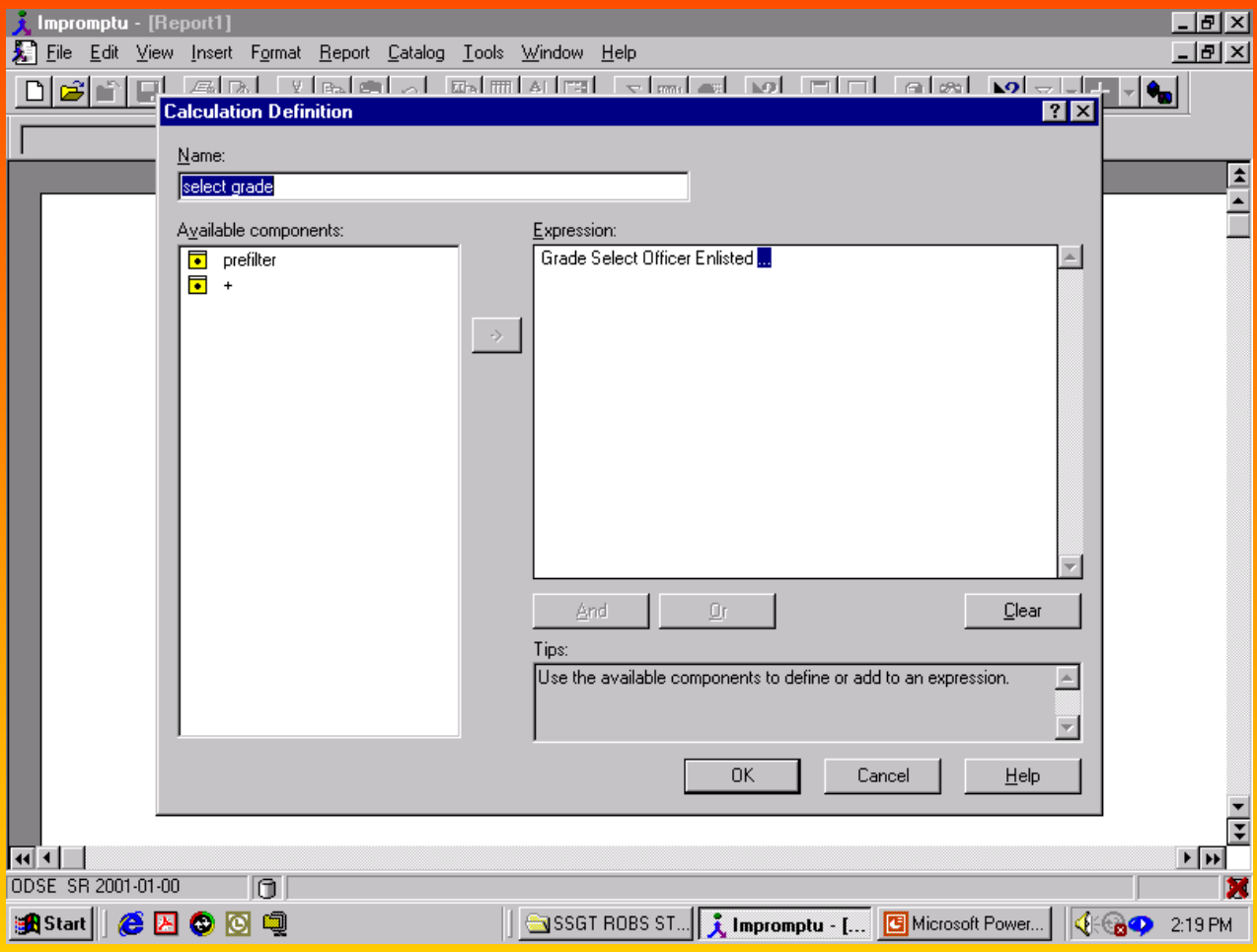
Chapter 6

Building Calculated Data Items



Double click on the first data item you would like to be merged. This will move it into the expression box.

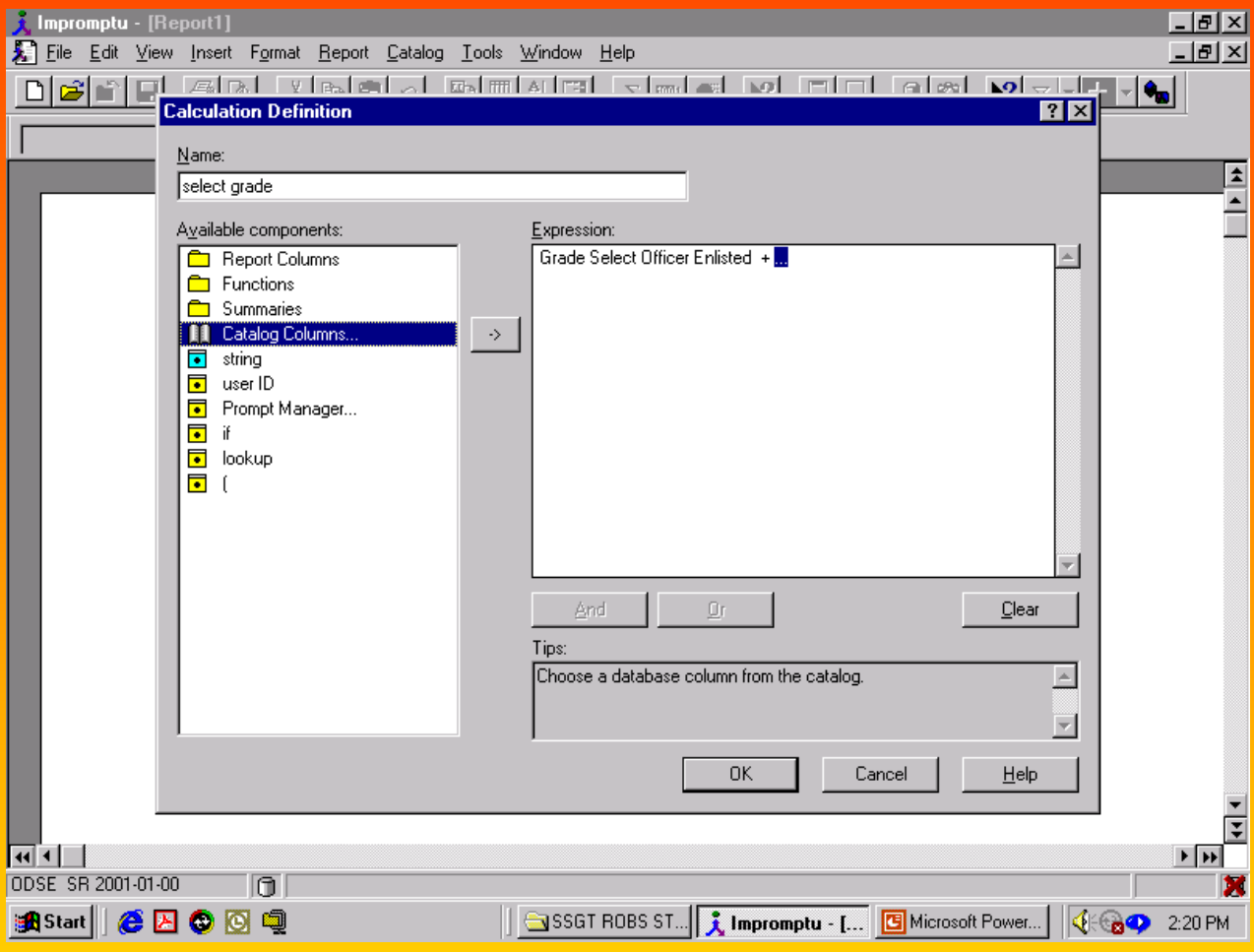
Building Calculated Data Items



Under available components, select the plus sign (+).

Chapter 6

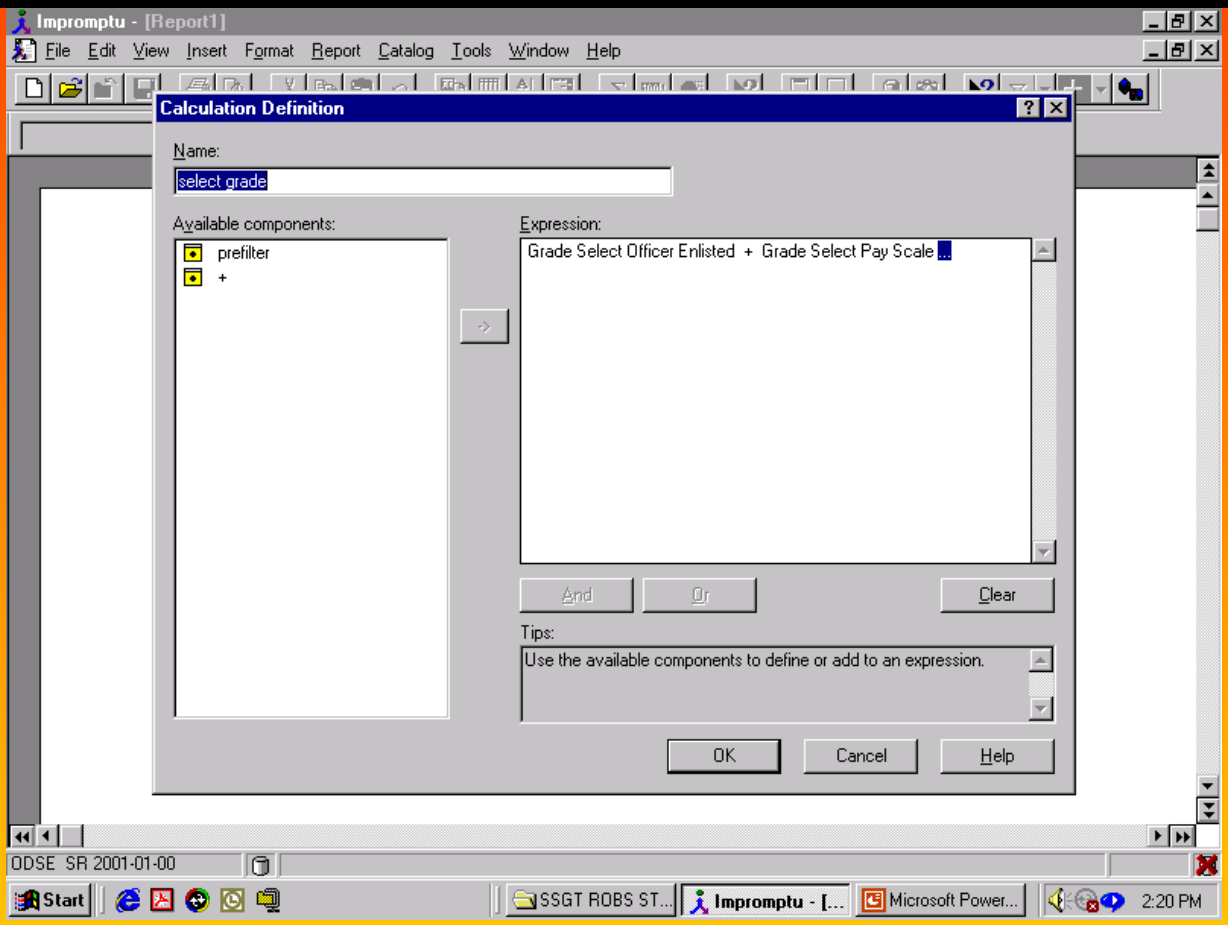
Building Calculated Data Items



Then repeat the process to get second data item that you would like merged.

Chapter 6

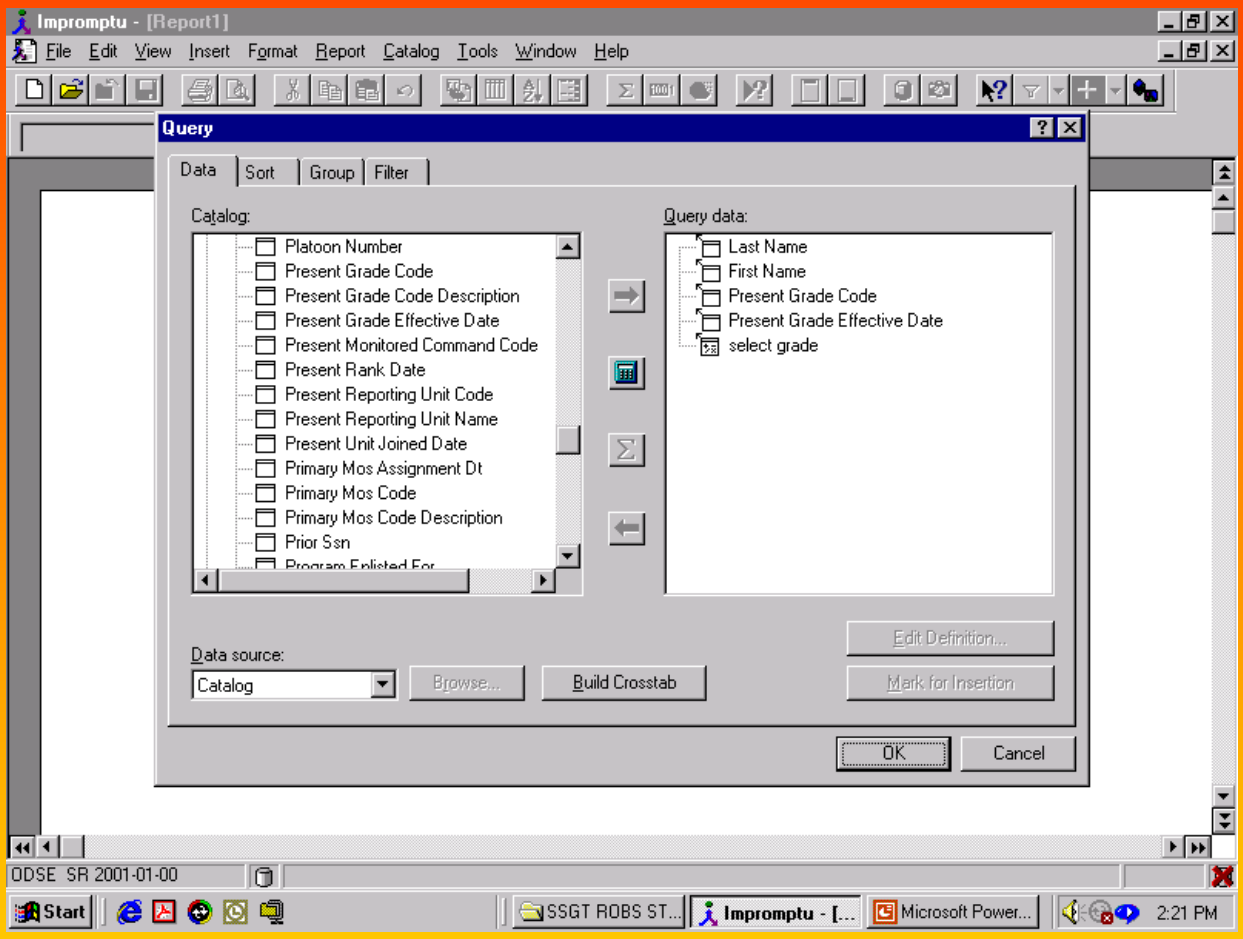
Building Calculated Data Items



Your expression now reads that you would like ODSE to create a data item that merges the OFFICER ENLISTED and the PAY SCALE info for select grades. Example: A SSgt that is selected for the next grade would have a GRADE SELECT OFFICER ENLISTED code of 'E' and a GRADE SELECT PAY SCALE of '7'. Click on OK.

Chapter 6

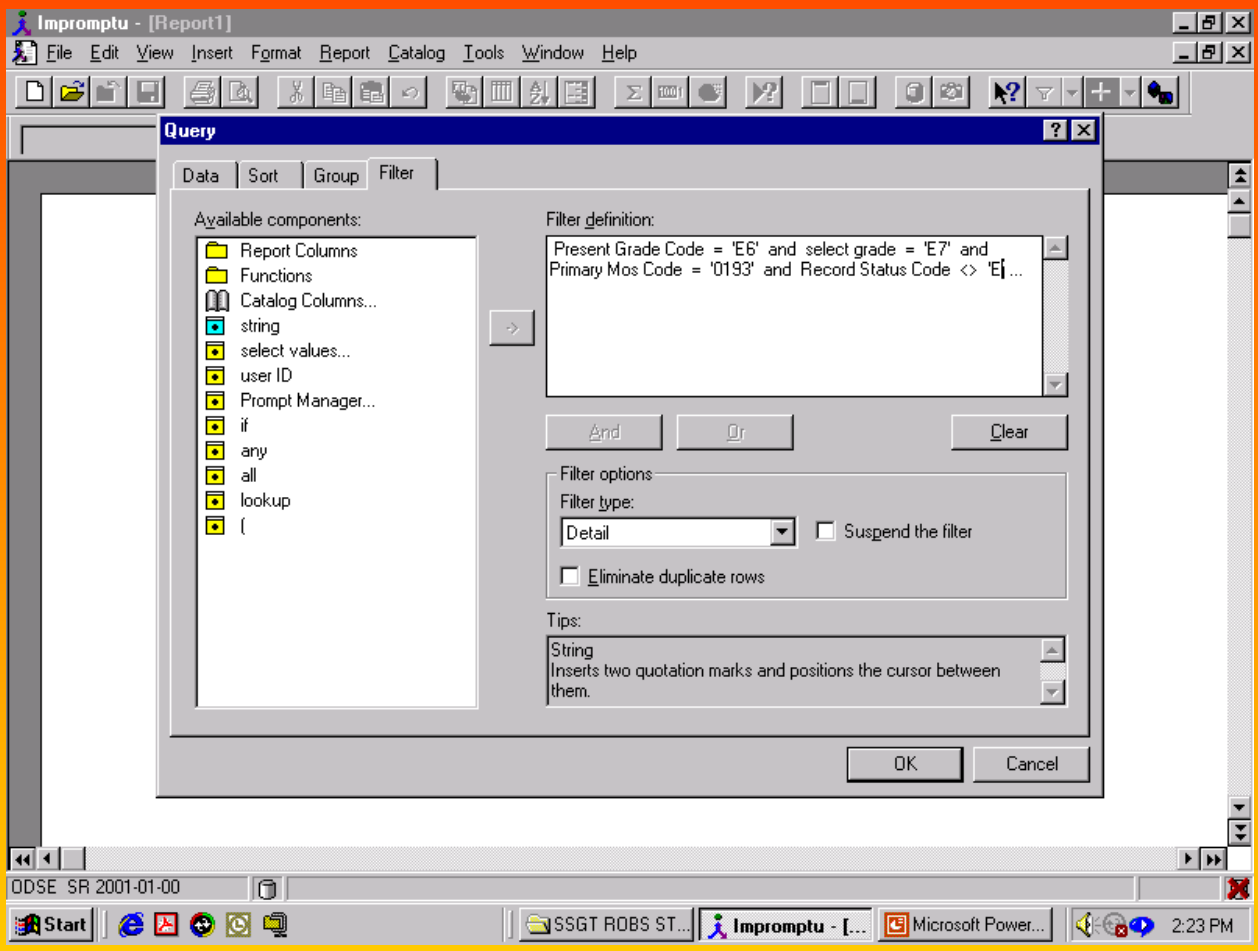
Building Calculated Data Items



Look at the query data, it now contains a new data item for select grade. Notice that the icon next to it has calculation symbols, which tells you that it is a calculation.

Chapter 6

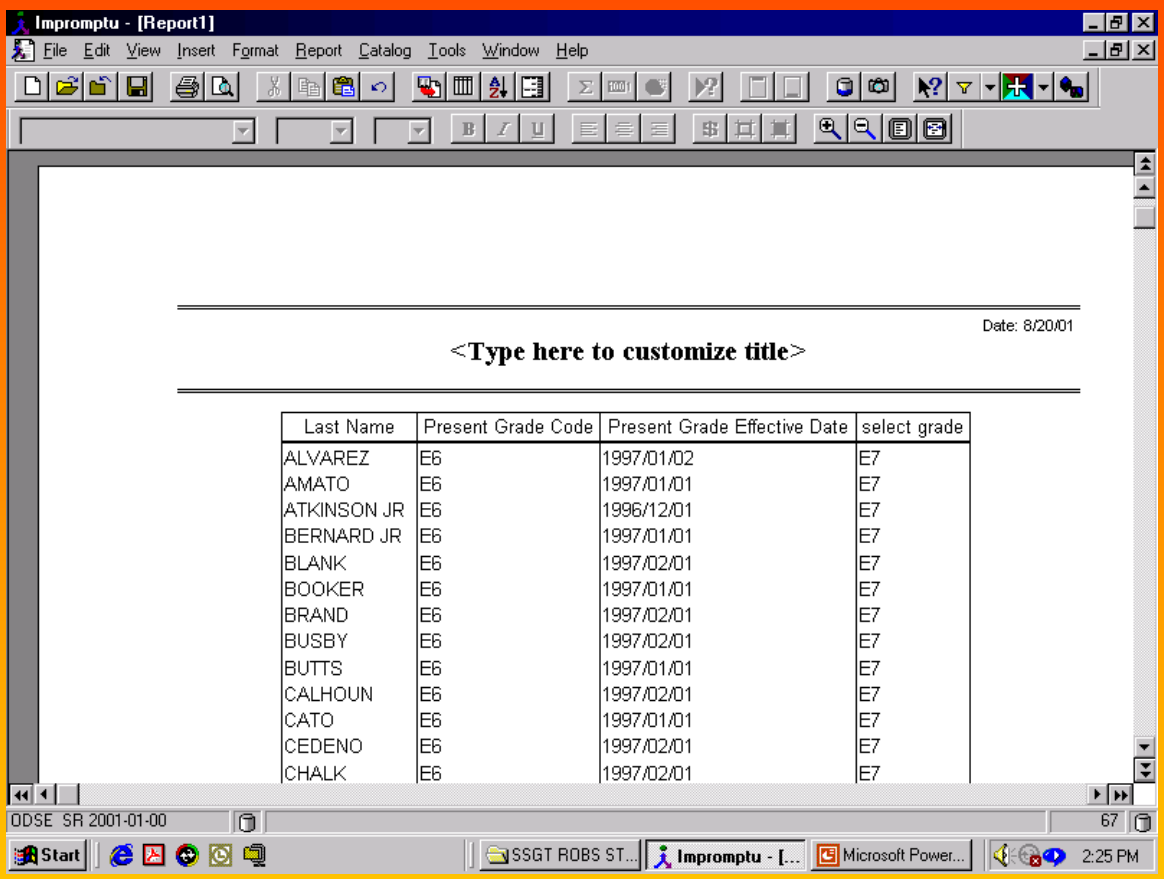
Building Calculated Data Items



You have the capability to filter with a calculated data item. In this case, we are asking only for E6s with a grade select of E7.

Chapter 6

Building Calculated Data Items



Your report would look like this.

Chapter 6

Building Calculated Data Items

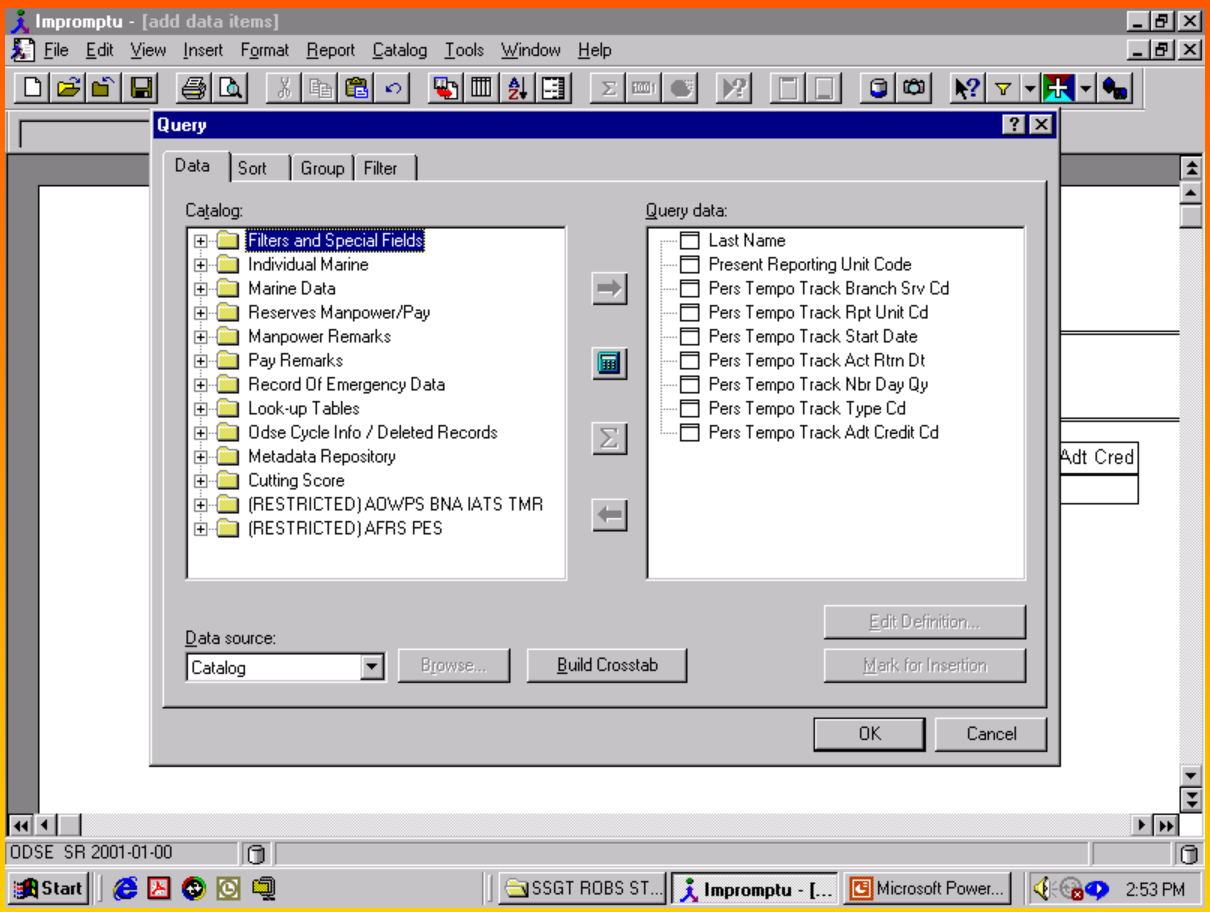
Now lets look at how to merge a summation with a data item.

Lets get a running total of pers tempo days by SSN.

Chapter 6

Building Calculated Data Items

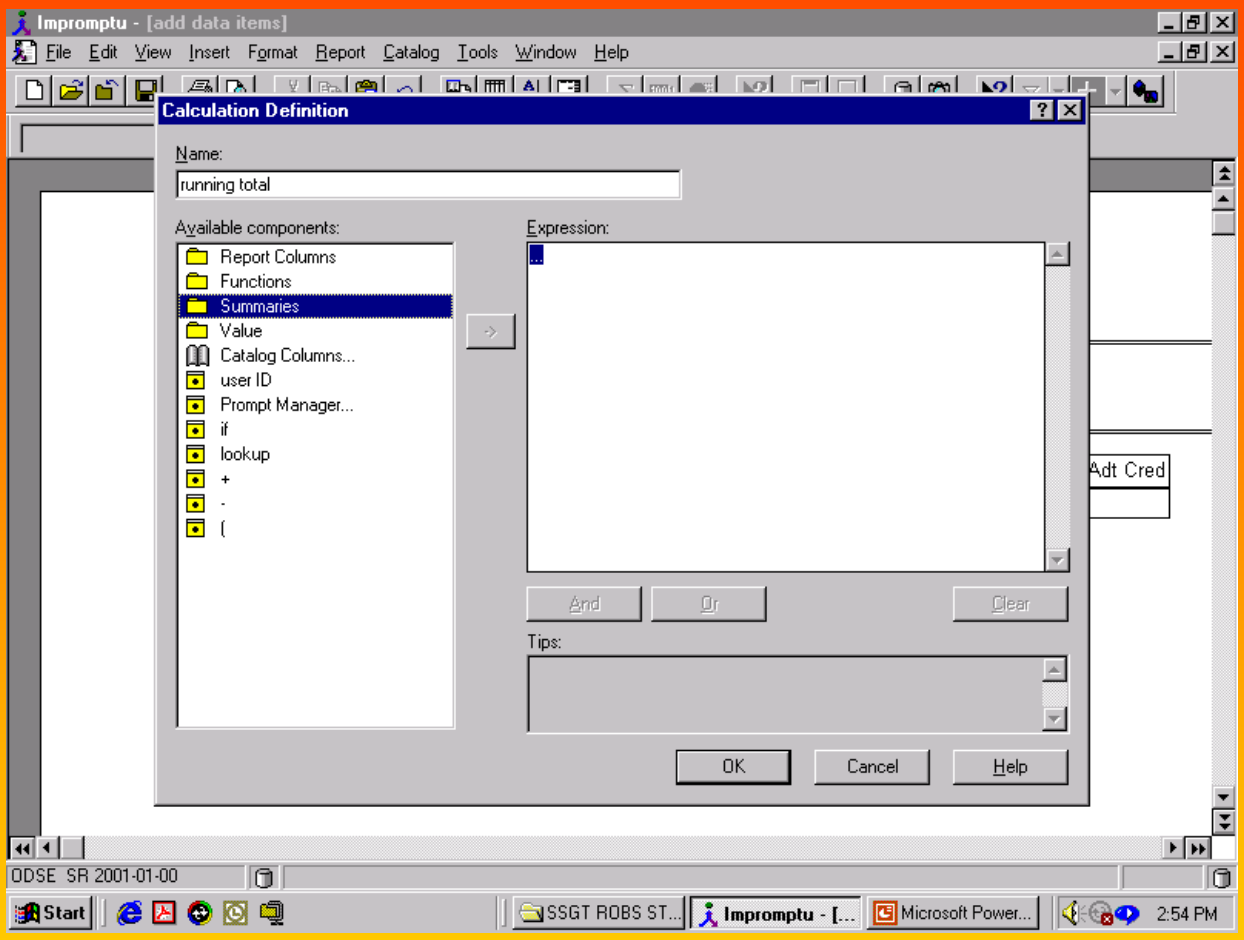
The Pers Tempo Track Nbr Day Qy lists the total days for each pers tempo event, so lets use this data item to get the total number of days that each individual (SSN) would have.



Select the data items that you would like your report to display. To make your calculation, click on the green calculator icon in the middle of the data tab window.

Chapter 6

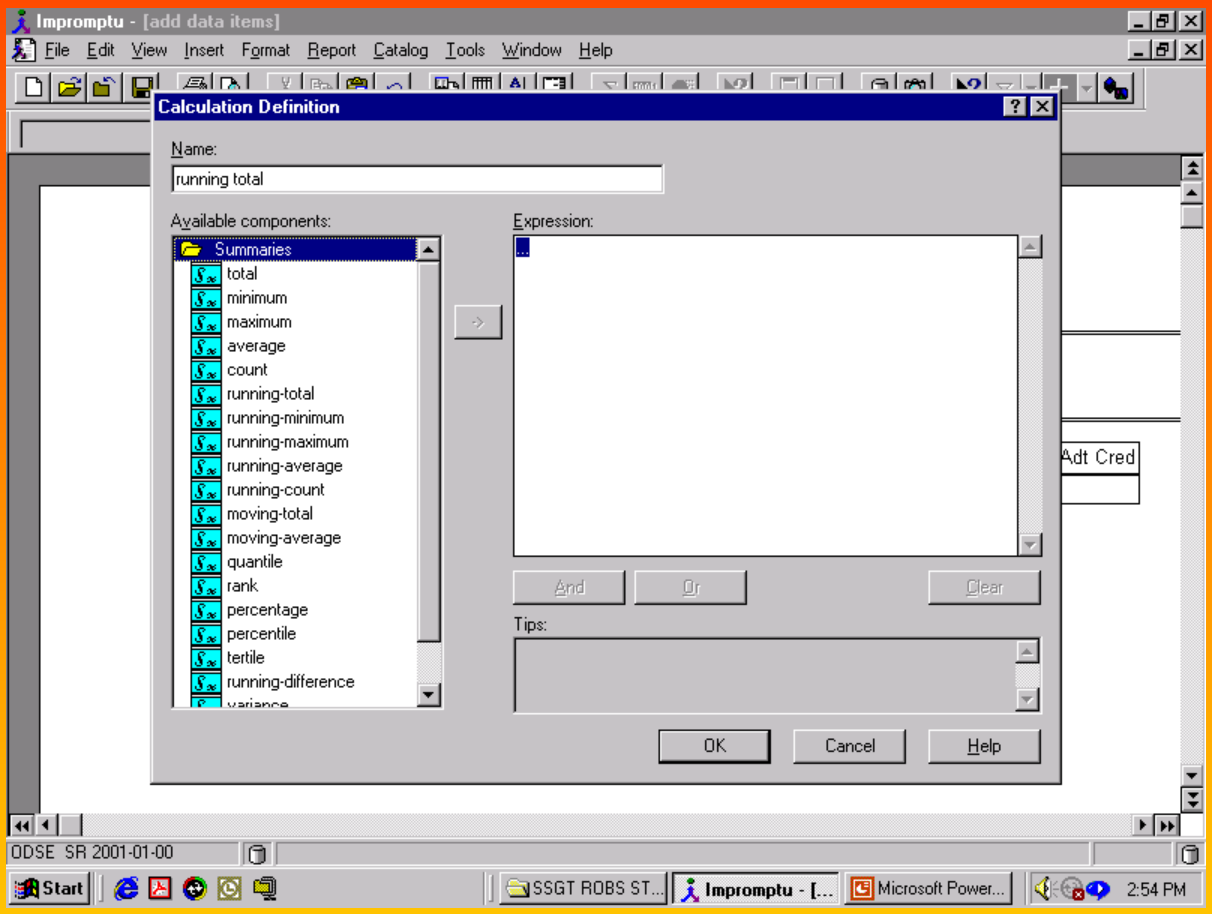
Building Calculated Data Items



Open the summary folder by clicking on it and select running-total.

Chapter 6

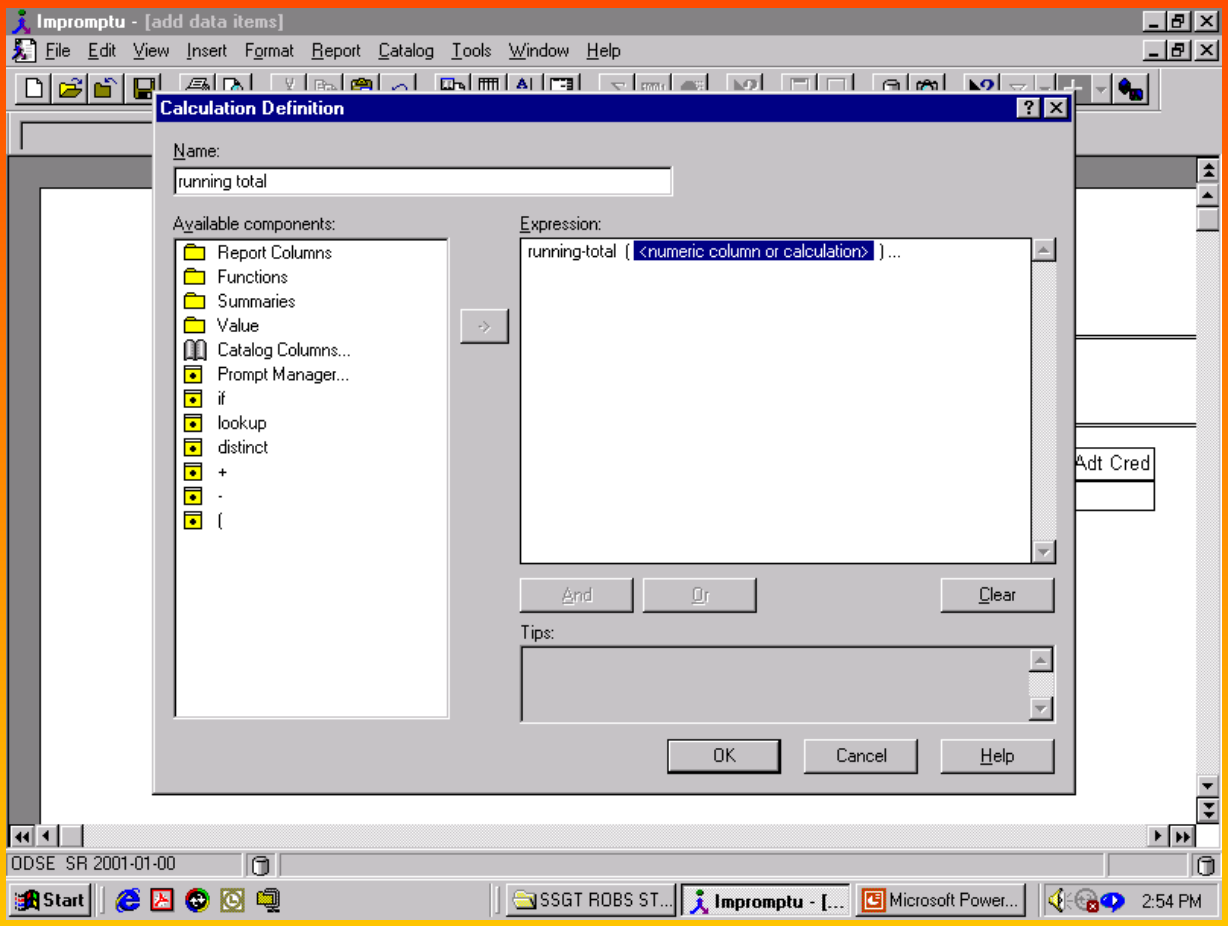
Building Calculated Data Items



It will look like this. Click on 'running-total'.

Chapter 6

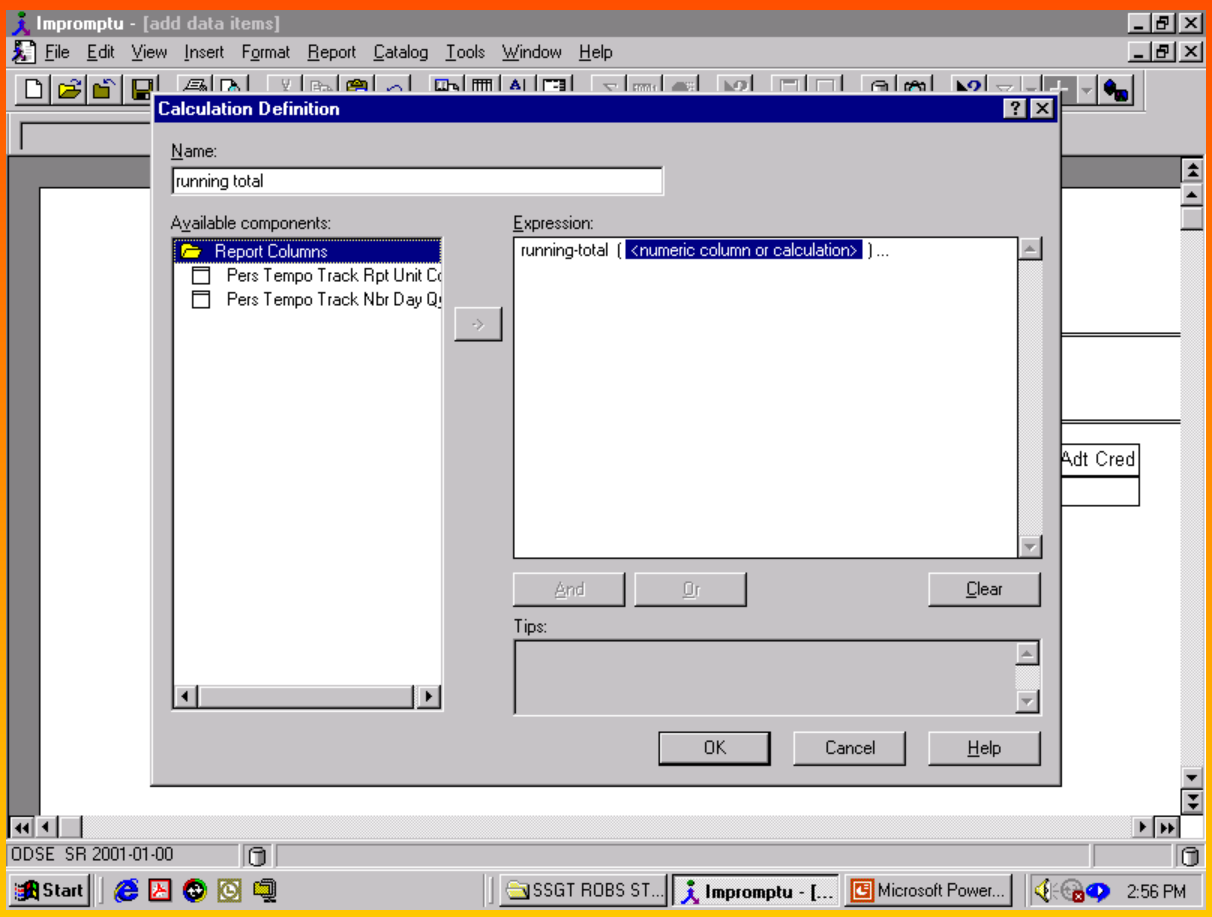
Building Calculated Data Items



Once you have selected running total, Impromptu would like you to select the data item you would like the running total for. Click on Report Columns.

Chapter 6

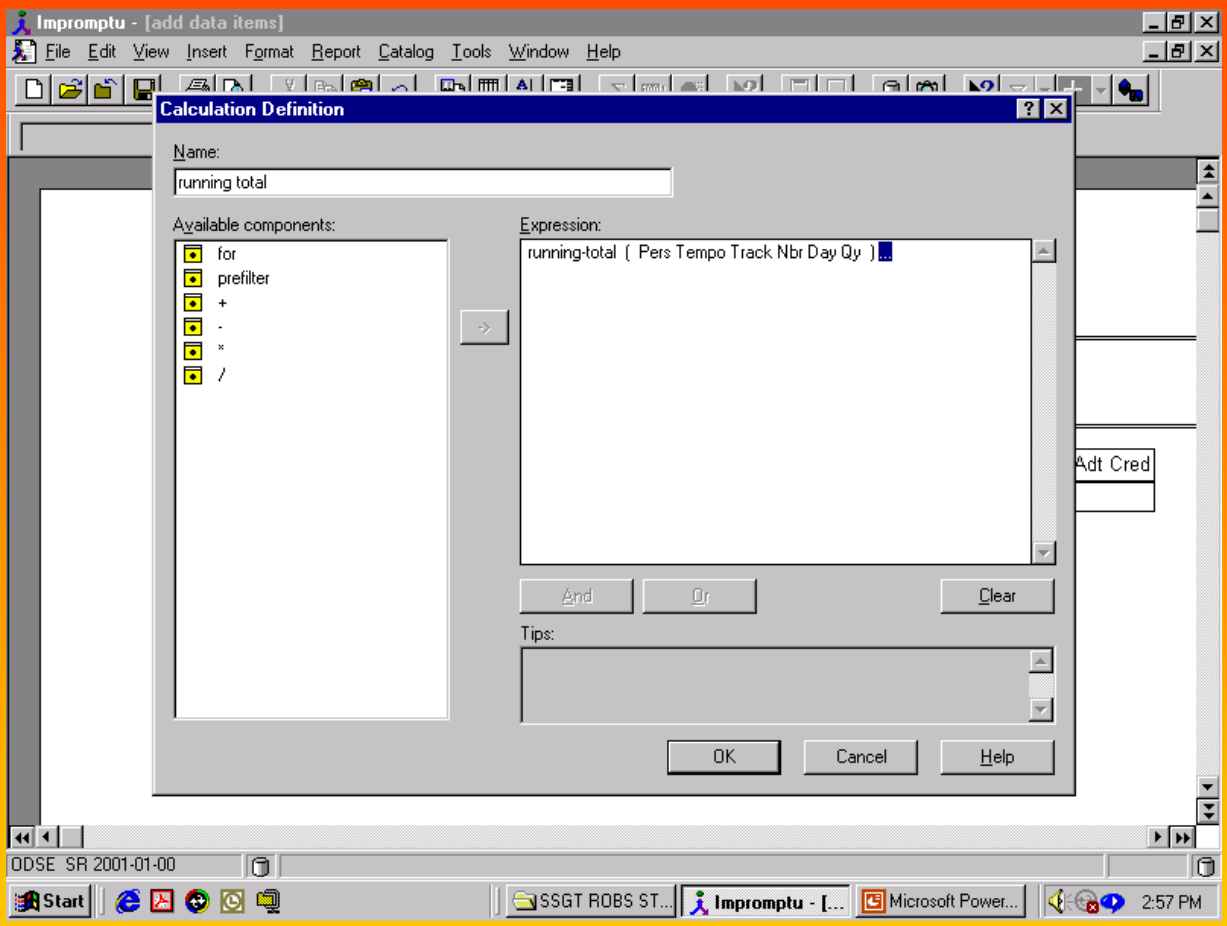
Building Calculated Data Items



A listing of all available data item that allow for running totals will appear, select the desired data item by clicking on Pers Tempo Track Nbr Day Qy.

Chapter 6

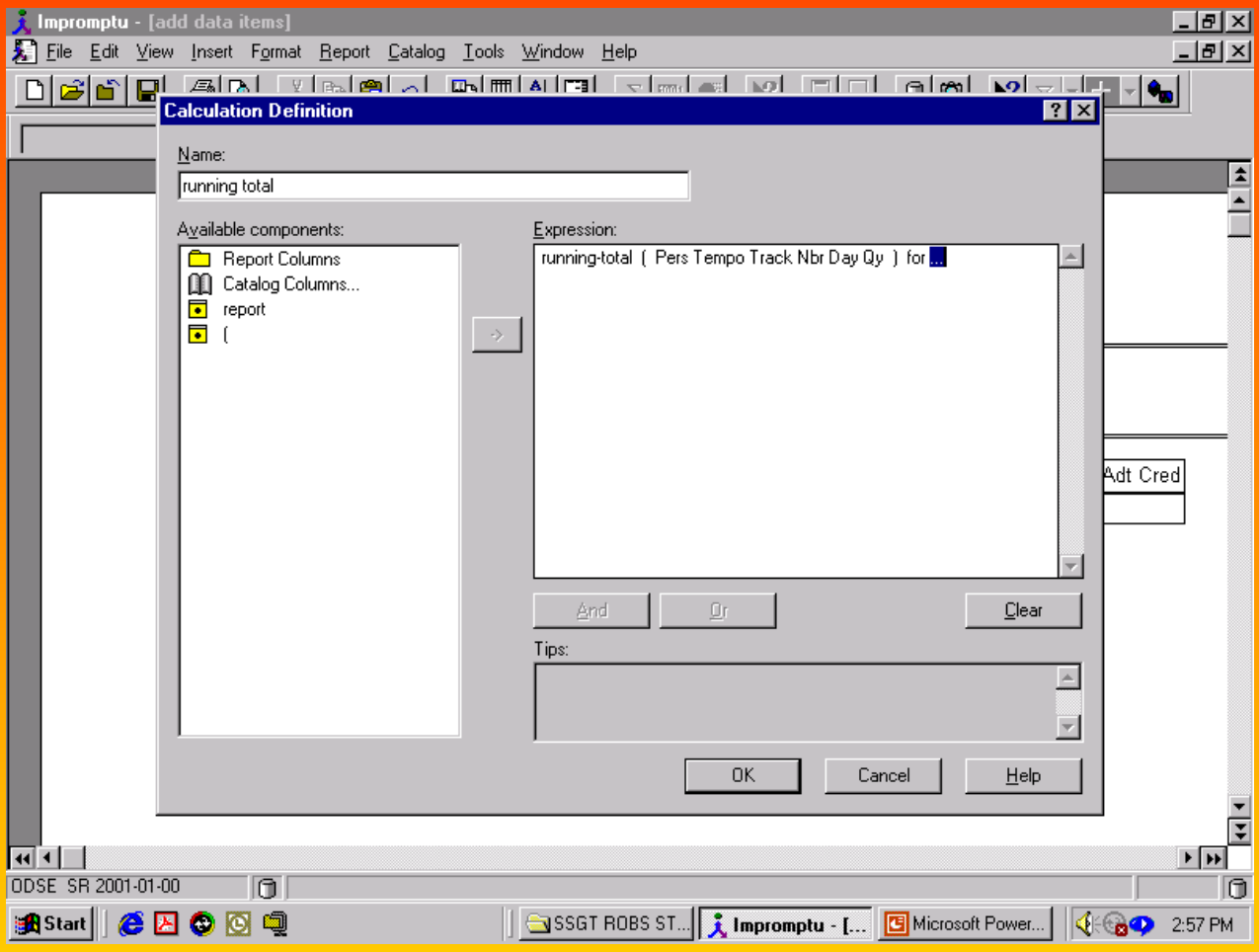
Building Calculated Data Items



If you do not specify what you would like the running-total for, the system will have no other choice but to pull against the entire report. In this case, it should be against each SSN. So click on 'for'.

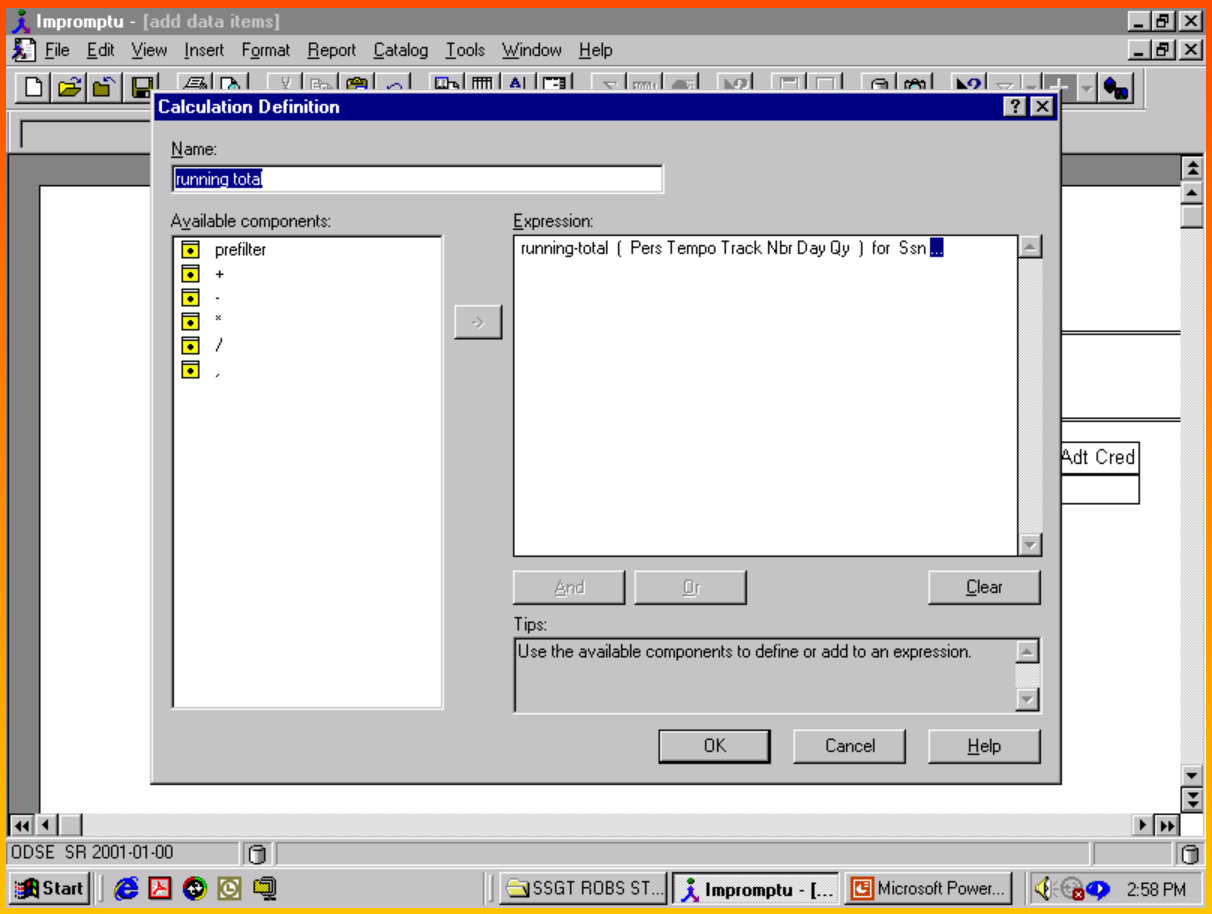
Chapter 6

Building Calculated Data Items



Go into the Catalog Column and get the data item 'SSN'.

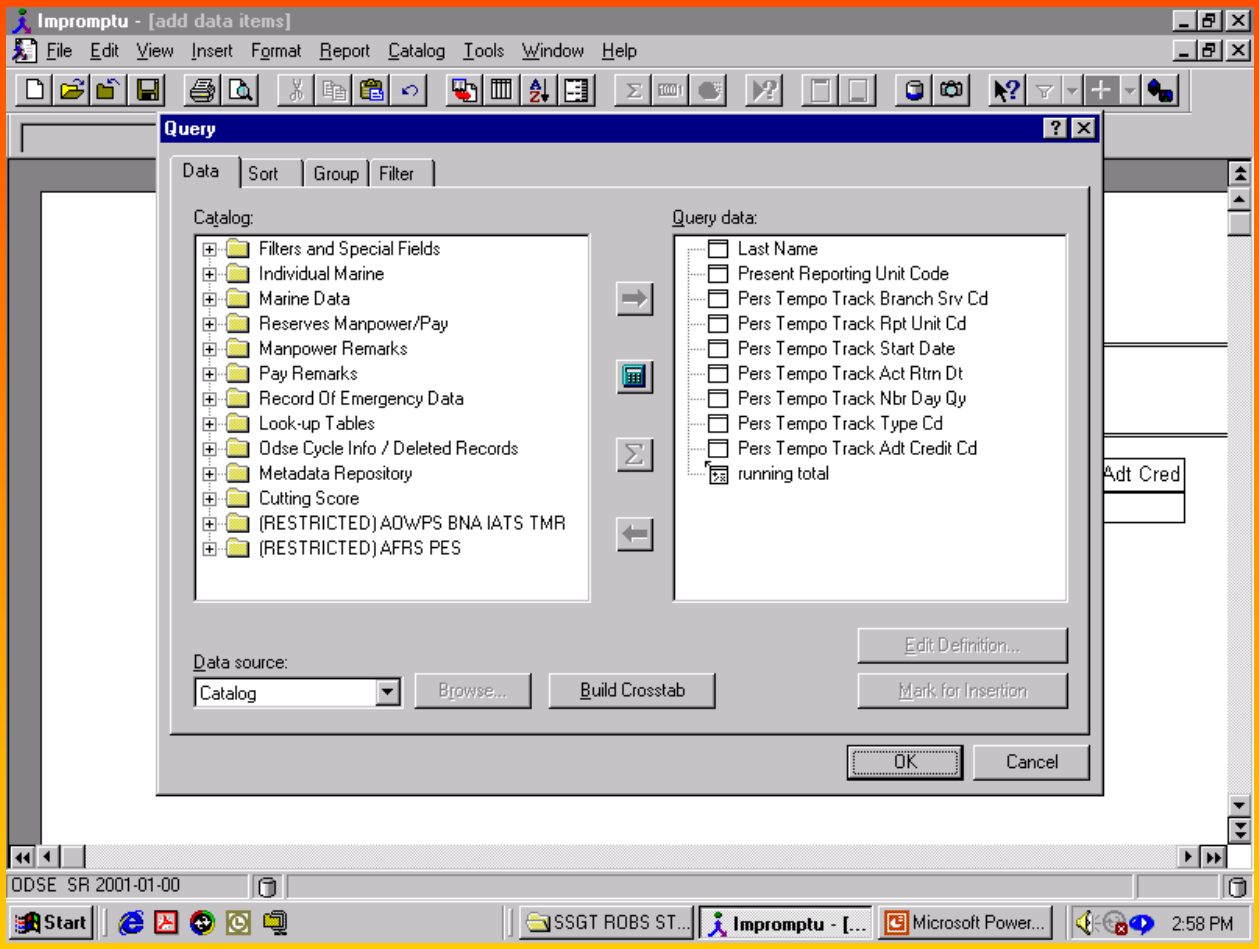
Building Calculated Data Items



Your expression will look like this. Click on OK to get out of the calculation definition.

Chapter 6

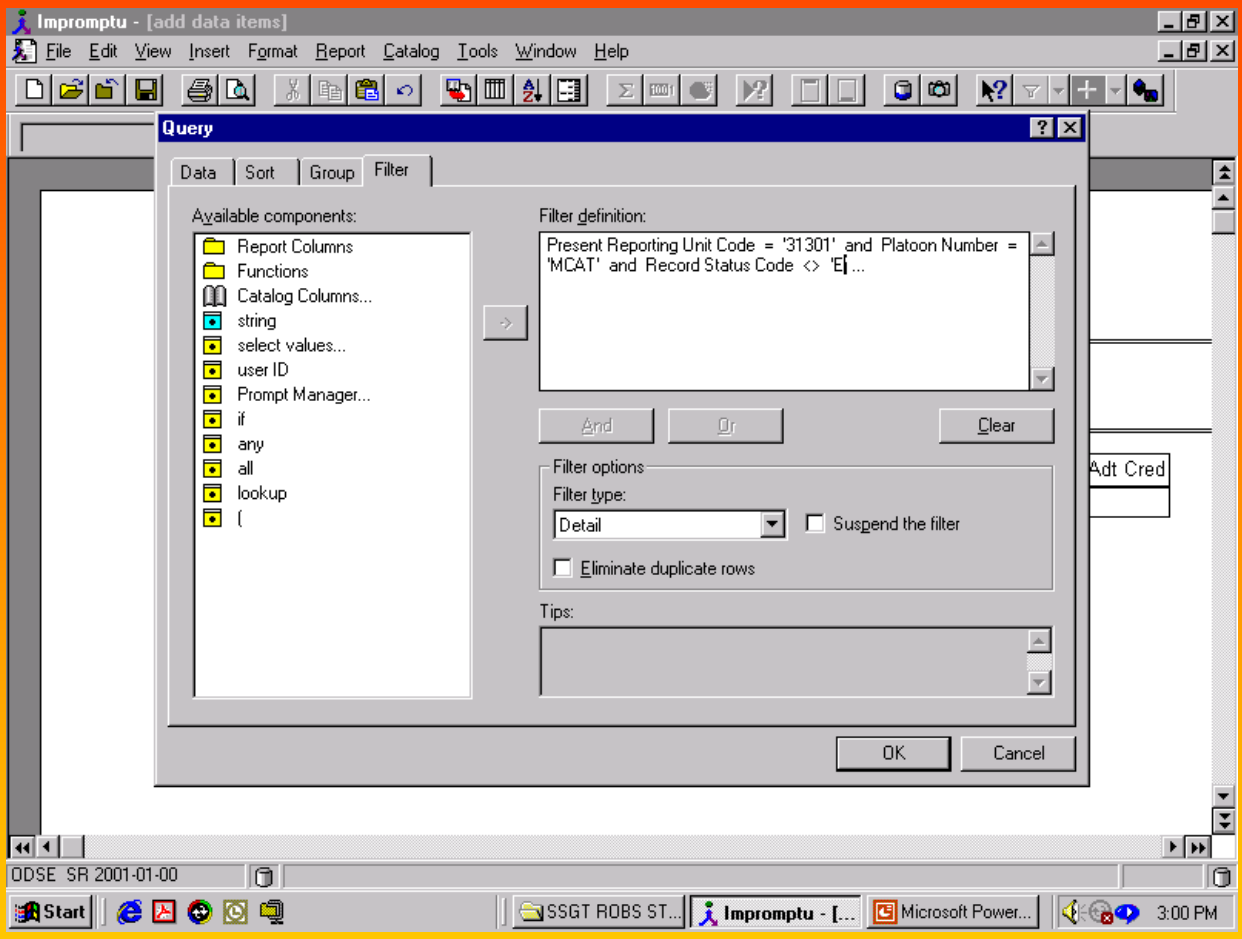
Building Calculated Data Items



Notice that you now have a new data item called running total that has the calculated icon.

Chapter 6

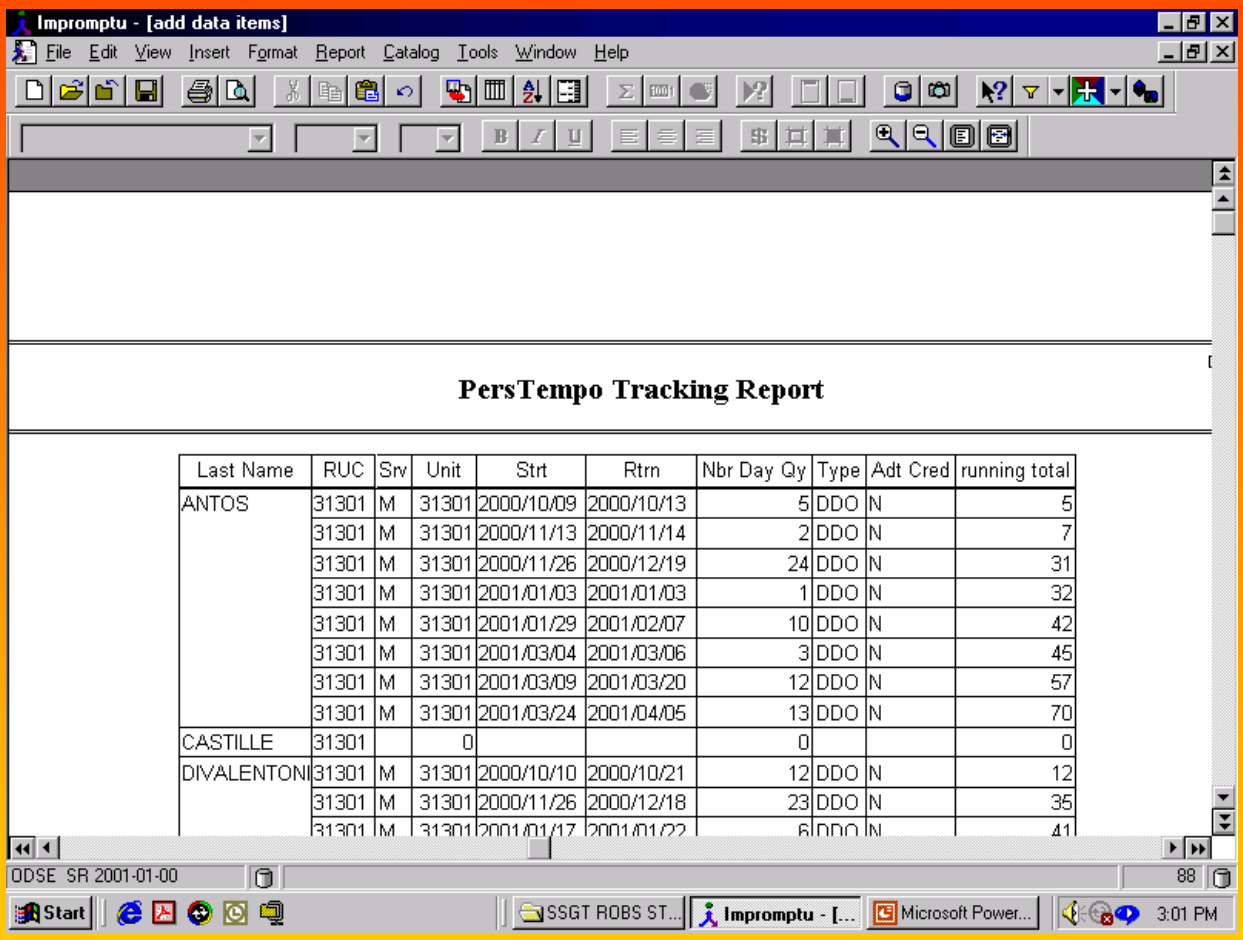
Building Calculated Data Items



Build you filter definition as normal and click on OK.

Chapter 6

Building Calculated Data Items



Last Name	RUC	Srv	Unit	Strt	Rtrn	Nbr Day Qy	Type	Adt Cred	running total
ANTOS	31301	M	31301	2000/10/09	2000/10/13	5	DDO	N	5
	31301	M	31301	2000/11/13	2000/11/14	2	DDO	N	7
	31301	M	31301	2000/11/26	2000/12/19	24	DDO	N	31
	31301	M	31301	2001/01/03	2001/01/03	1	DDO	N	32
	31301	M	31301	2001/01/29	2001/02/07	10	DDO	N	42
	31301	M	31301	2001/03/04	2001/03/06	3	DDO	N	45
	31301	M	31301	2001/03/09	2001/03/20	12	DDO	N	57
	31301	M	31301	2001/03/24	2001/04/05	13	DDO	N	70
CASTILLE	31301		0			0			0
DIVALENTONI	31301	M	31301	2000/10/10	2000/10/21	12	DDO	N	12
	31301	M	31301	2000/11/26	2000/12/18	23	DDO	N	35
	31301	M	31301	2001/01/17	2001/01/22	6	DDO	N	41

Your report would look like this. Notice your running total for each members pers tempo events.

Chapter 6

Building Calculated Data Items

Now lets build a couple of calculations that purpose will be to allow Oracle to perform math. Look at the fields ‘Effective Date’ and ‘Unit Diary Date’ within the Allotments/TRF ADV ->TRF/ADV ->Transaction Research Folder in the ODSE catalog. The two fields are in a number format. If we want a report that tells the number of days that it took for a entry to be put on a unit diary we have to change these fields to a date format to allow Oracle to count the number of days from ‘Effective Date’ to ‘Unit Diary Date’.

This is a three part process:

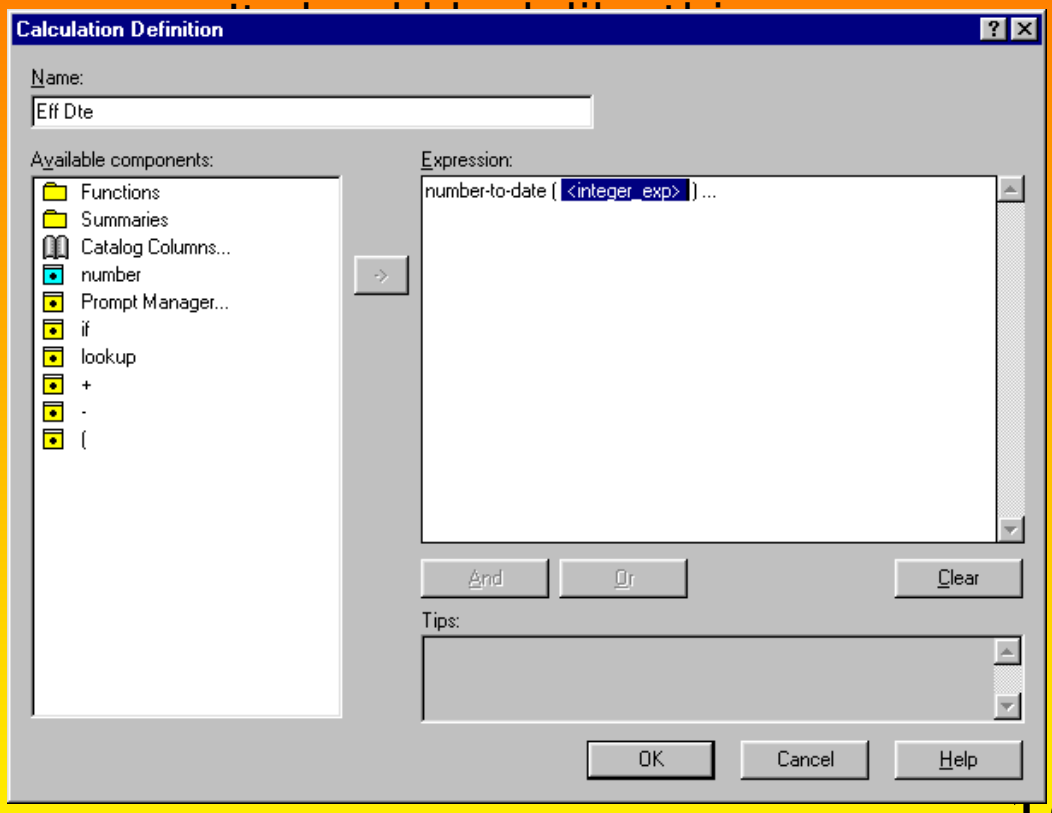
(1) Create the calculation for ‘Effective Date’
(2) Create the calculation for ‘Unit Diary Date’
(3) Create the math calculation to subtract the ‘Unit
Diary Date’ from the ‘Effective Date’.

Lets build the calculations...

Chapter 6

Building Calculated Data Items

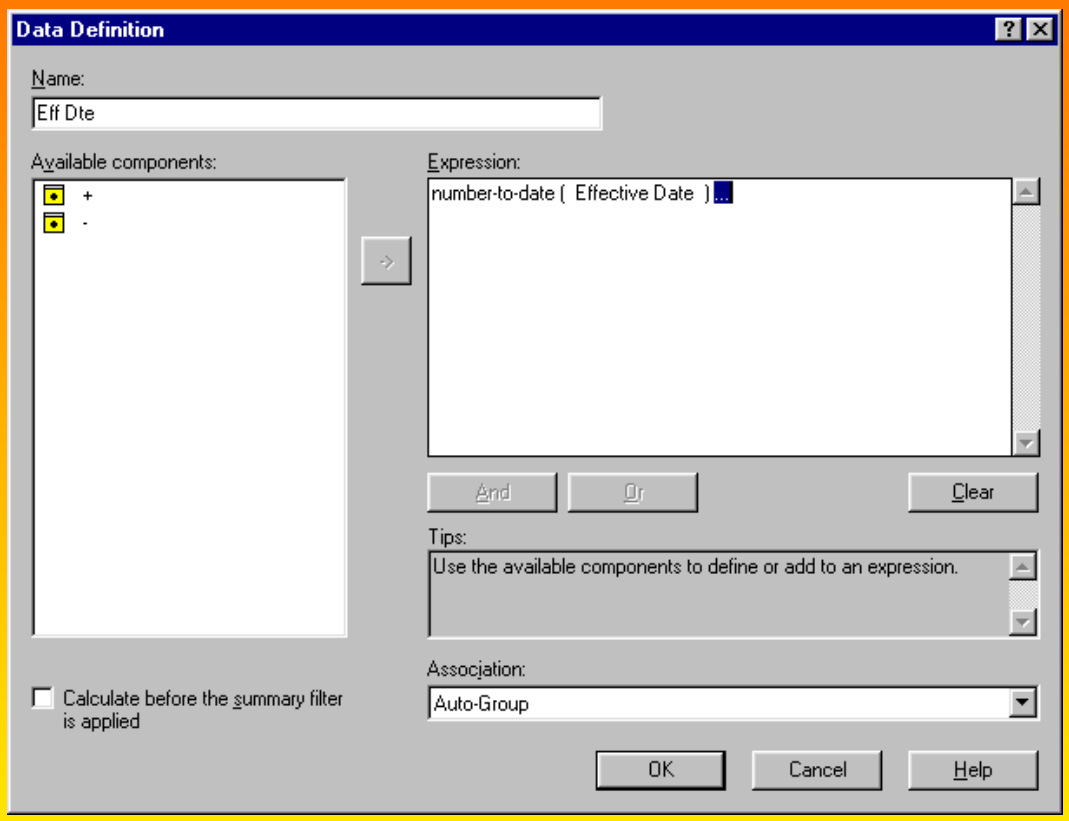
Click on the green calculator in the data tab of the query. Change the name to “Eff Dte” and then go into the functions folder. We are looking for the ‘number-to-date’ operator. When you find it, double click on it and it will move to the expression window.



Chapter 6

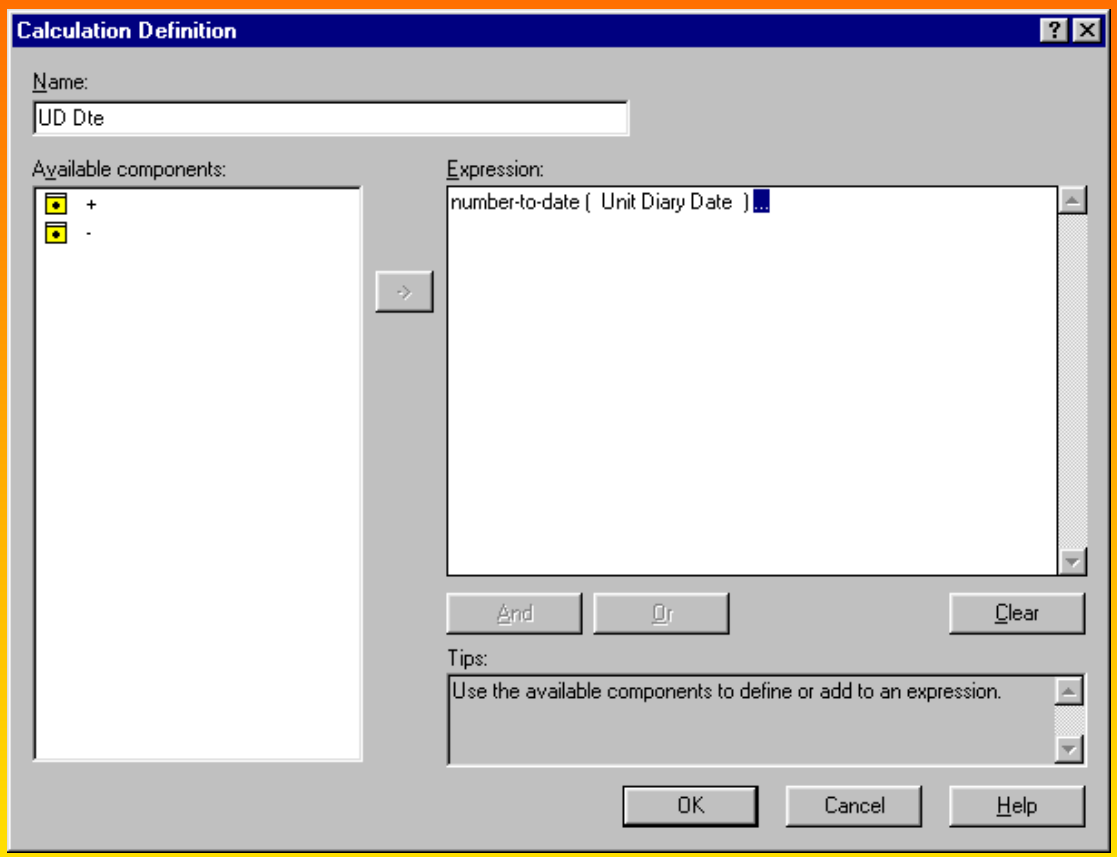
Building Calculated Data Items

Lets add the field that should be changed from a number format to a date format. You can get the field by clicking on the Catalog Column Folder. The calculation expression will look like this. Once you are finished, click on OK.



Building Calculated Data Items

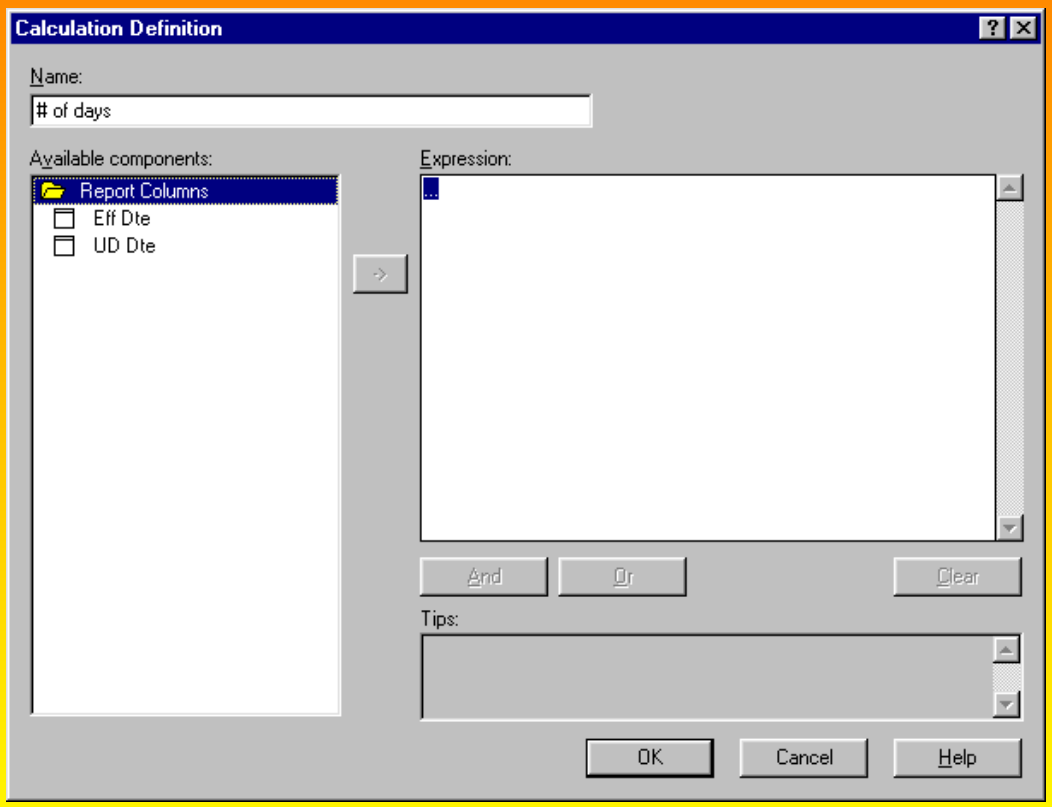
Repeat this same process, but this time use ‘Unit Diary Date’ for your calculation. It should look like this when you finish.



Chapter 6

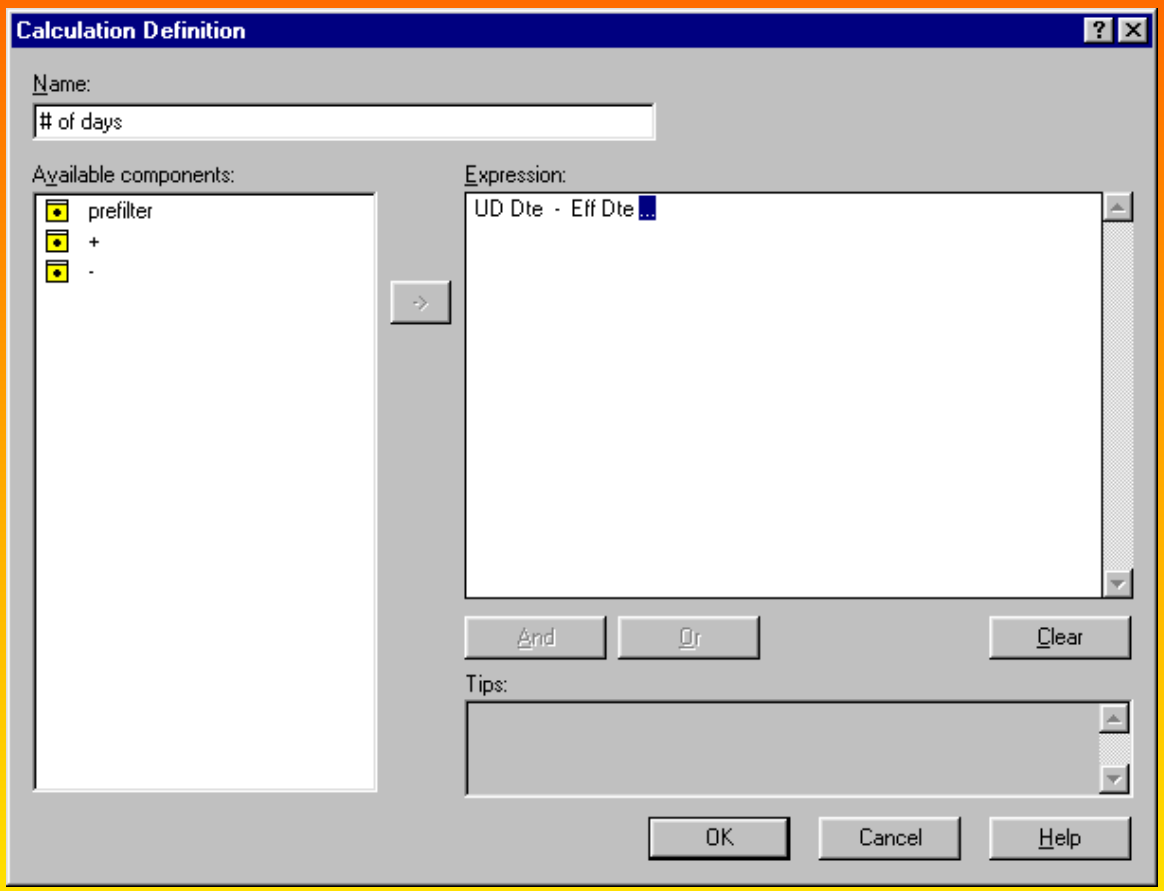
Building Calculated Data Items

Now lets take the two data calculations that we just built and create a new data item called '# of days' that tell how long it took for an entry to get to a unit diary. It is simple math, start by click in the green calculator again and then give the calculation a name (# of days). Then double click on the Report Column and you will see the two calculation you previously made.



Building Calculated Data Items

Double click on ‘UD Dte’ , then the minus sign ‘-’ , then double click on report columns again and get the ‘Eff dte’ item. The expression should look like the below.

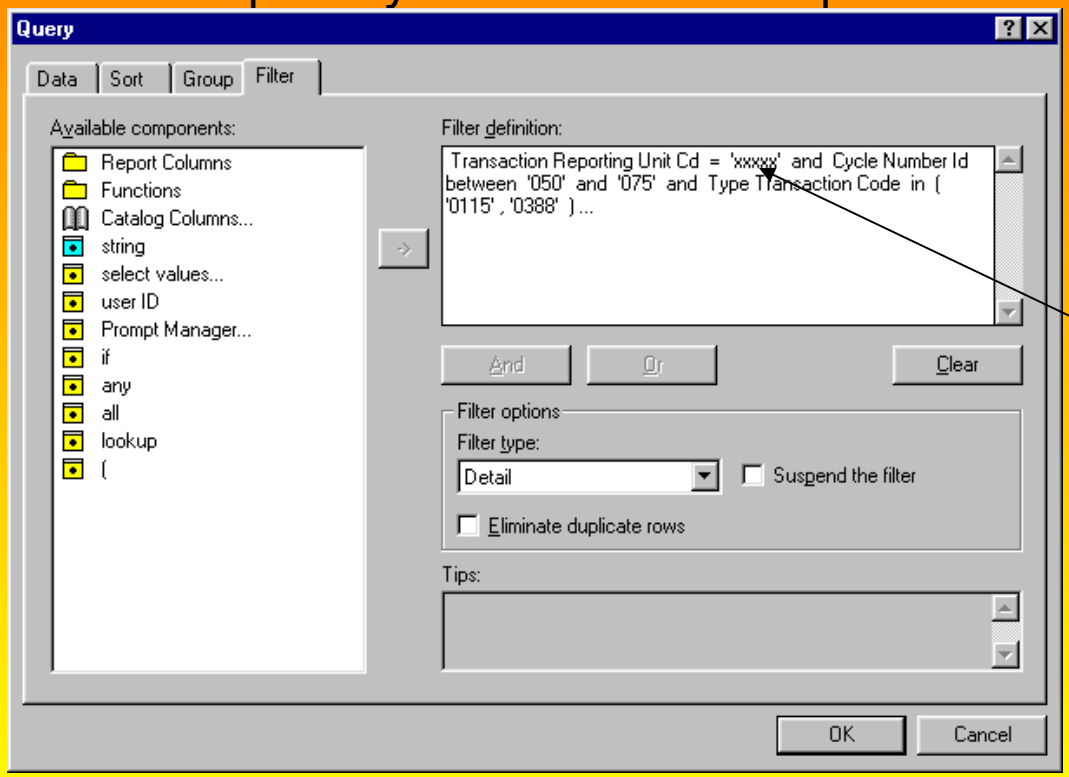


Chapter 6

Building Calculated Data Items

Build the rest of your report.

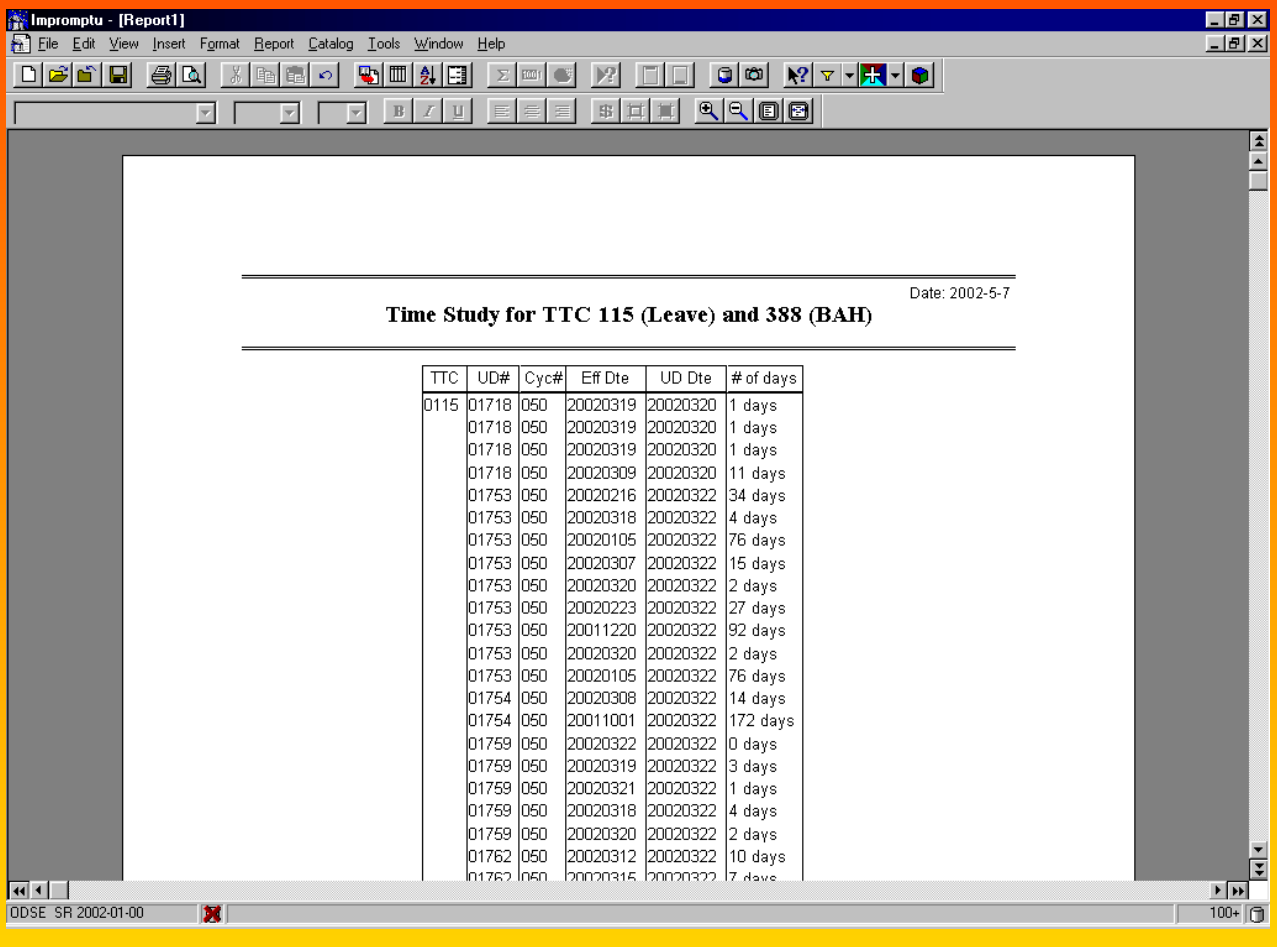
The end result will display the number of days it took to report all BAH for a specific ARUC from Cycle 050 – 075. The following Data Items were added to the Data Tab of the Query: Cycle Number ID, Type Transaction Code, Unit Diary Number ID. The report was sorted by the Cycle # & UD date and Grouped by TTC. Below is a picture of the Filter



The RUC should be changed to a 5-digit RUC that reports data, Ex '45002'

Building Calculated Data Items

The report should look like this.



TTC	UD#	Cyc#	Eff Dte	UD Dte	# of days
0115	01718	050	20020319	20020320	1 days
	01718	050	20020319	20020320	1 days
	01718	050	20020319	20020320	1 days
	01718	050	20020309	20020320	11 days
	01753	050	20020216	20020322	34 days
	01753	050	20020318	20020322	4 days
	01753	050	20020105	20020322	76 days
	01753	050	20020307	20020322	15 days
	01753	050	20020320	20020322	2 days
	01753	050	20020223	20020322	27 days
	01753	050	20011220	20020322	92 days
	01753	050	20020320	20020322	2 days
	01753	050	20020105	20020322	76 days
	01754	050	20020308	20020322	14 days
	01754	050	20011001	20020322	172 days
	01759	050	20020322	20020322	0 days
	01759	050	20020319	20020322	3 days
	01759	050	20020321	20020322	1 days
	01759	050	20020318	20020322	4 days
	01759	050	20020320	20020322	2 days
	01762	050	20020312	20020322	10 days
	01762	050	20020315	20020322	7 days

Chapter 7

Formatting Your Reports

Chapter 7

The purpose of this chapter is to provide guidance on formatting your report. Remember that Cognos Impromptu is a civilian corporation that does not puts dates in DOD format, or does not have to consider security of data when providing reports.

This chapter will cover the following formats:

-Telephone number format

-Date format (yyyymmdd & yymmdd)

-Removing characters from a data item (showing only last four of SSN)

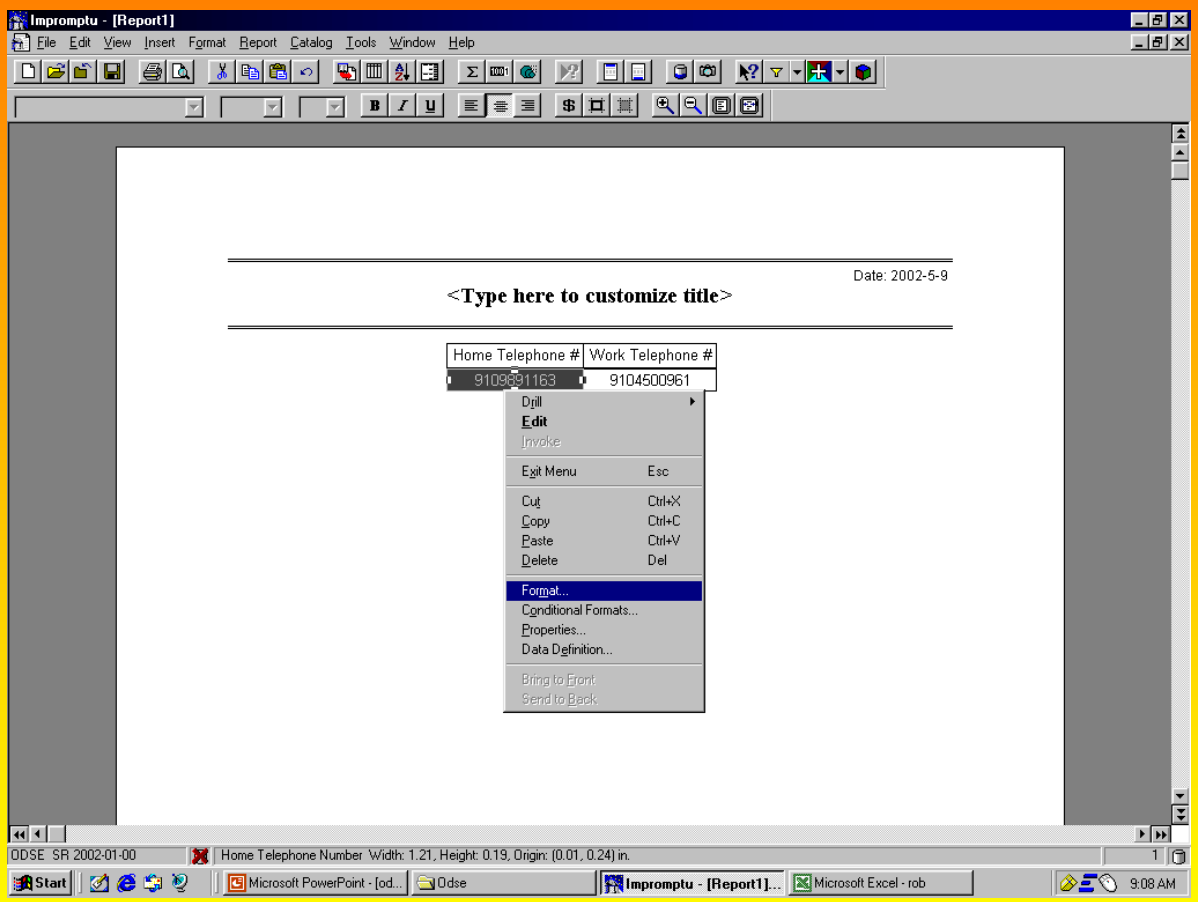
-Inserting decimal points in Pro/Con marks

-Showing data in all caps/natural caps

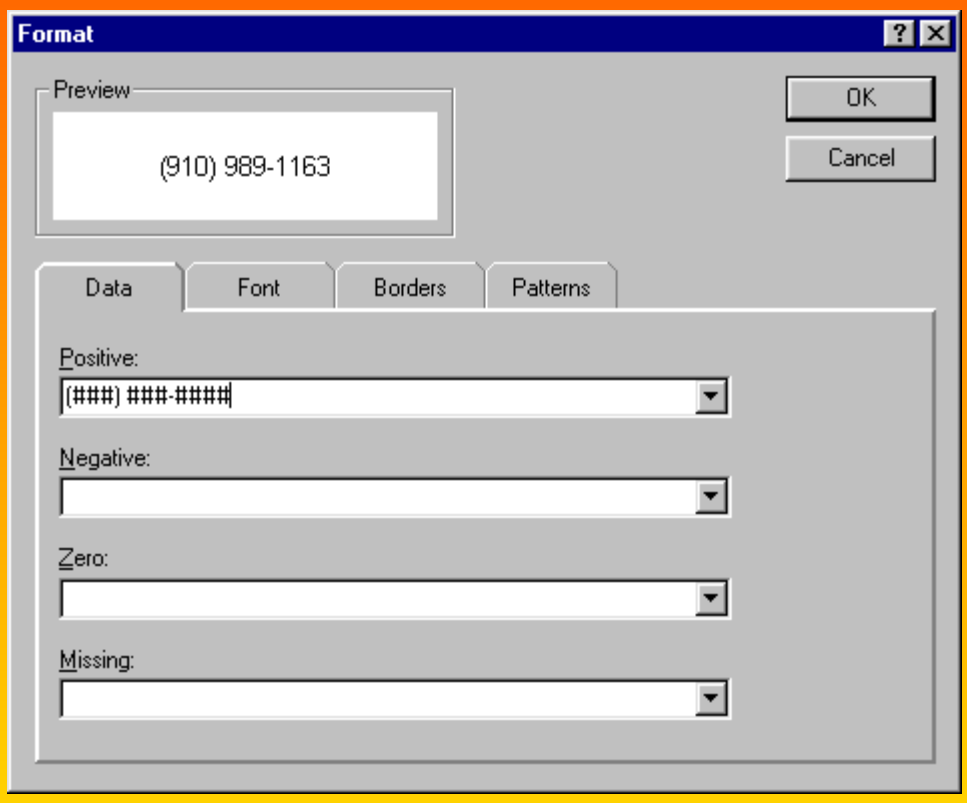
Chapter 7

Lets change the format for a telephone number. Lets put it in the following format: (910) 989-1163

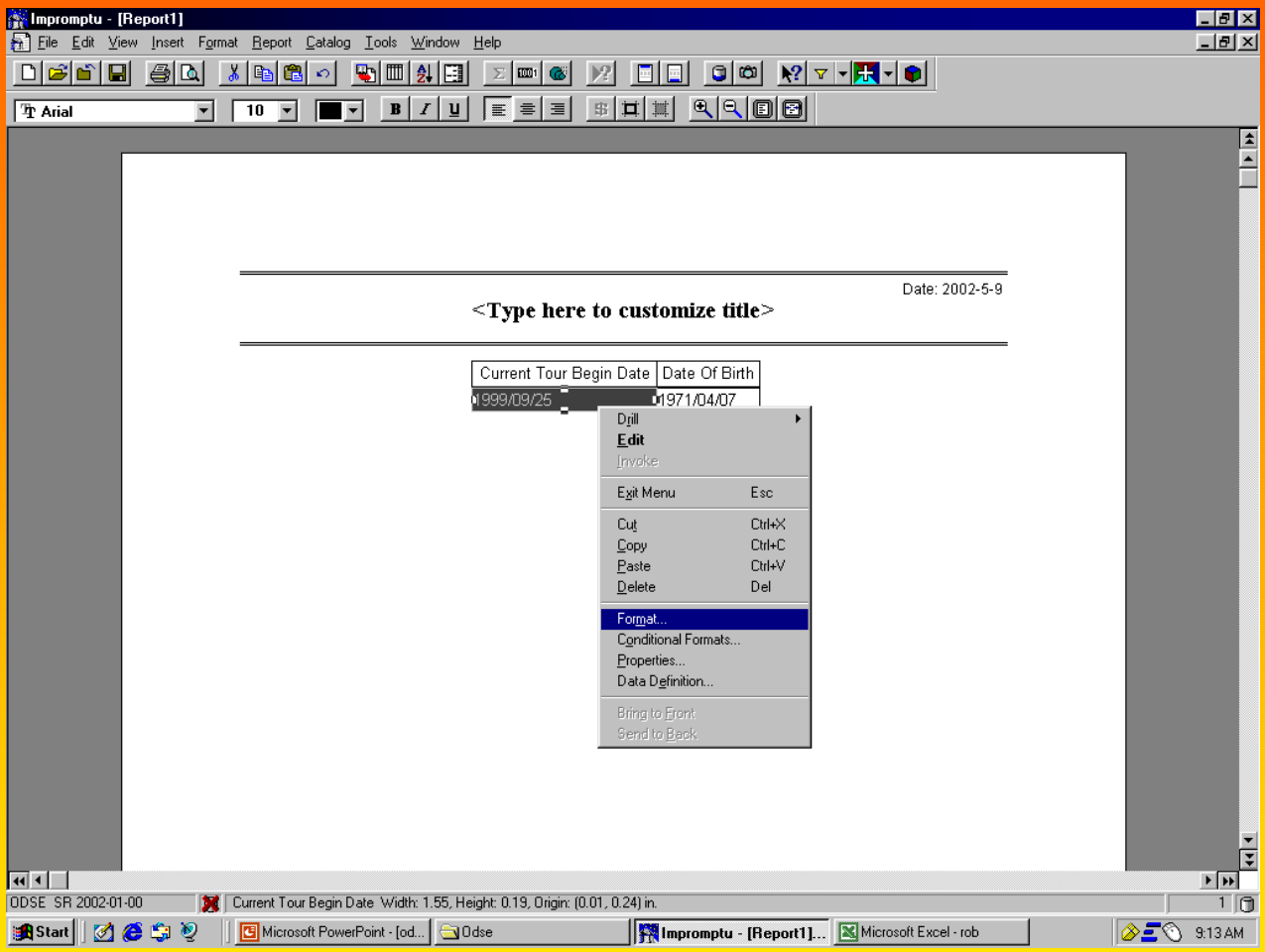
Right click on the data item that you would like to format and then click on the word ‘Format’



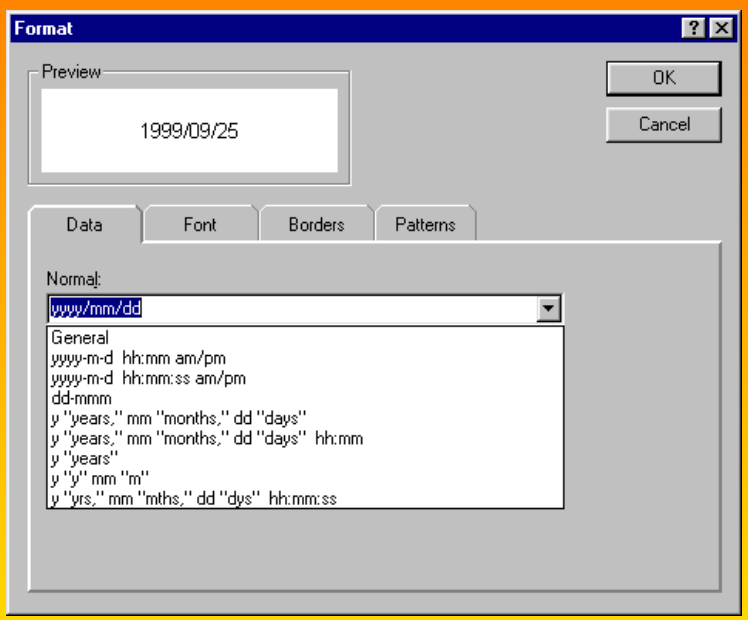
In the format window, change the positive line from General to the following: (###) ### - #### and then click on OK.



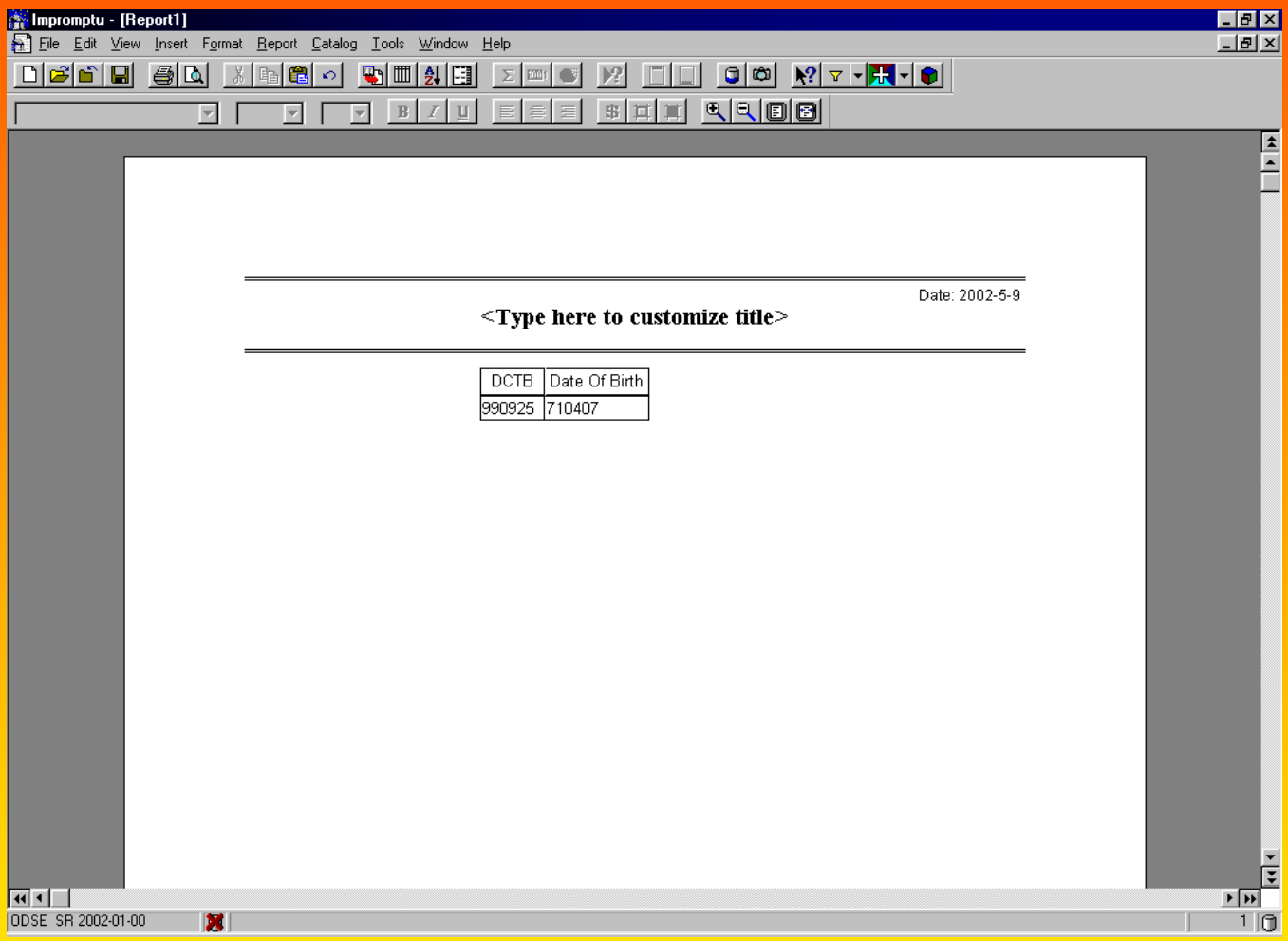
Lets change the format of a date. We can take out the slash or even take out the century.



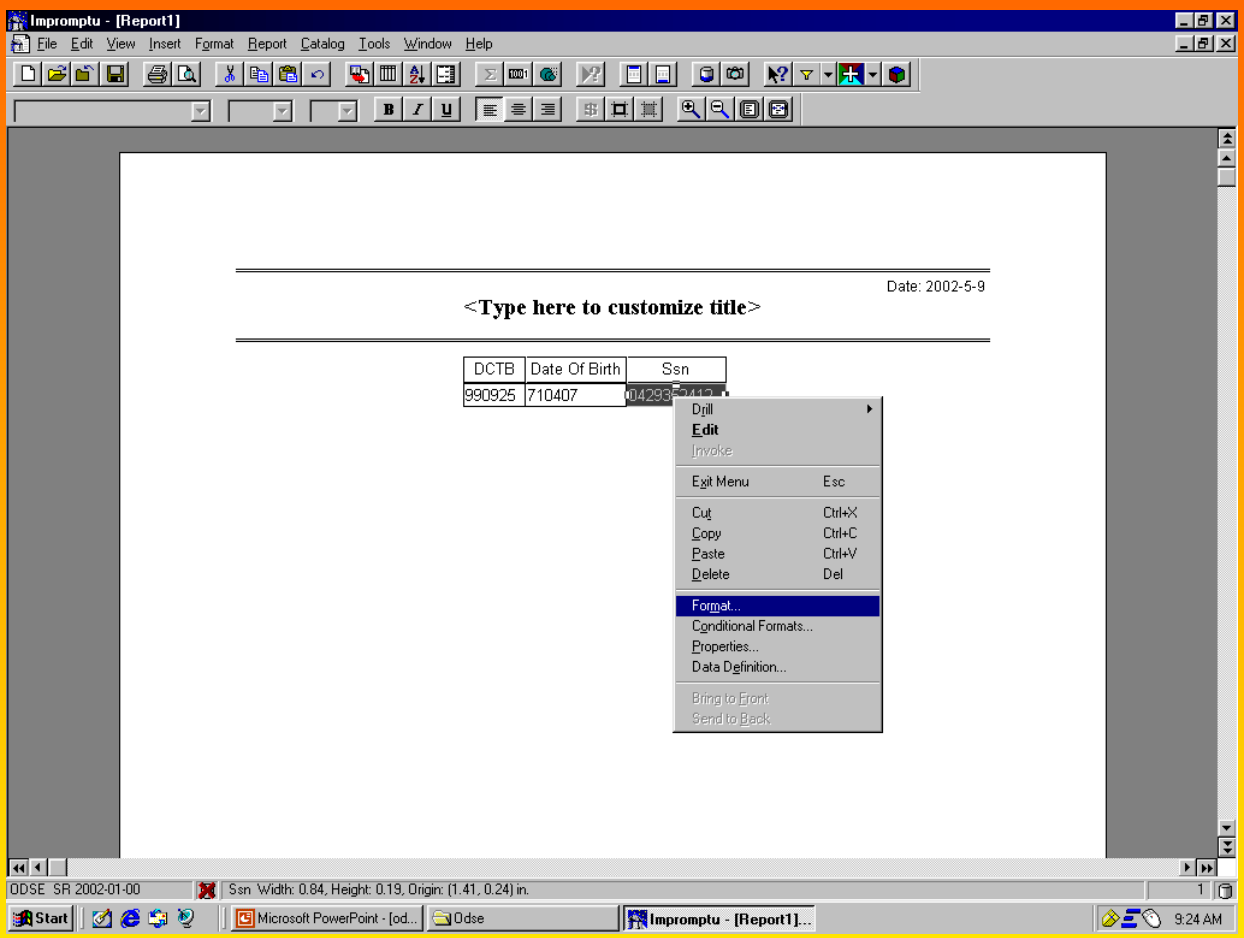
The format come up in yyyy/mm/dd format . To remove the slash, simply go in and delete them out. To delete the century, take out two of the 'yy'. The drop down box shows other options you can choose as a format. Click on OK when you are done.



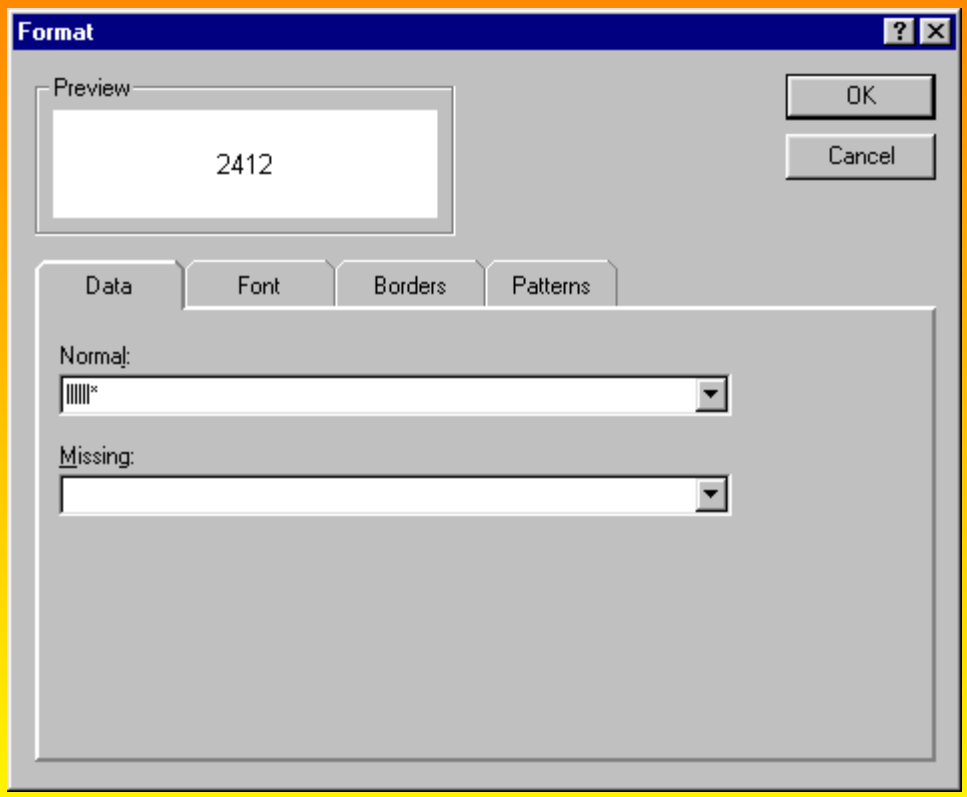
Your report would look like this if you changed your format to yymmdd.



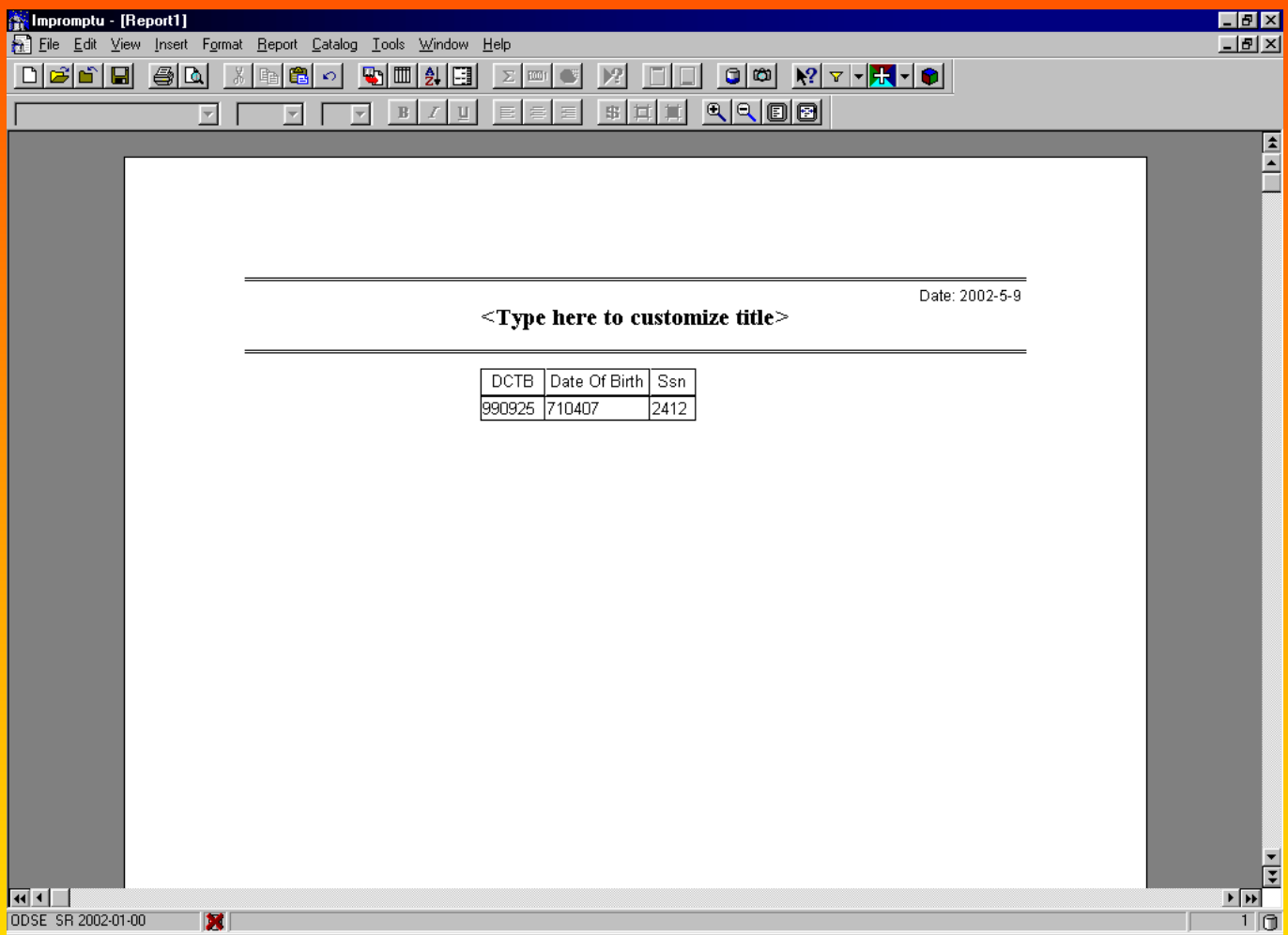
For security of SSNs IAW the Privacy Act, you can format that data item to only show the last 4 digits. Get into the format window.



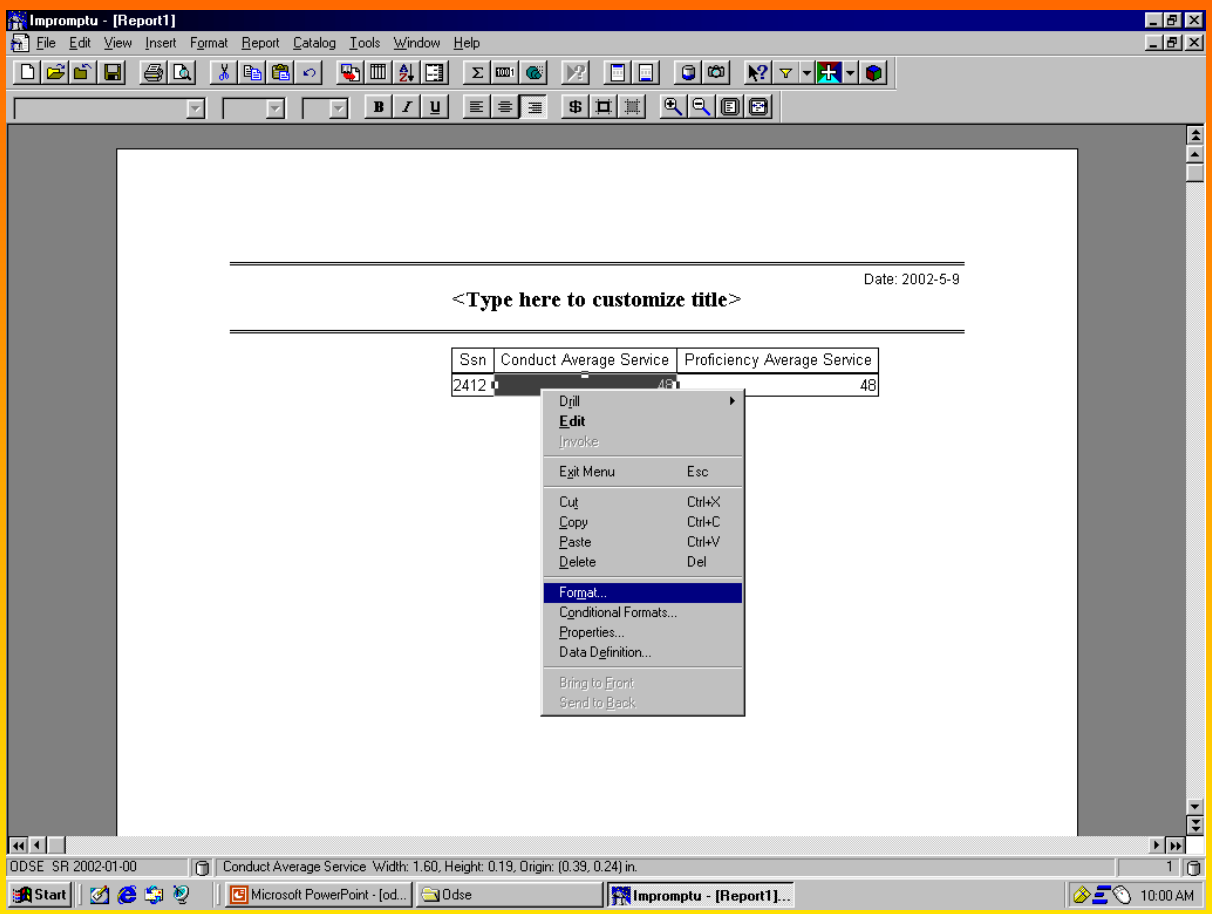
In the format window, on the positive line, change from general to ‘||||||*‘. The first character is the pipe key (shift backslash ; right above the Enter key) ; the pipe key represent the removal of one character within a data item. The * represents the remaining data within a data item. The six ‘|’ will remove the first 6 digits of the 10 digit SSN and the * tells Impromptu to show the remaining 4 digits.



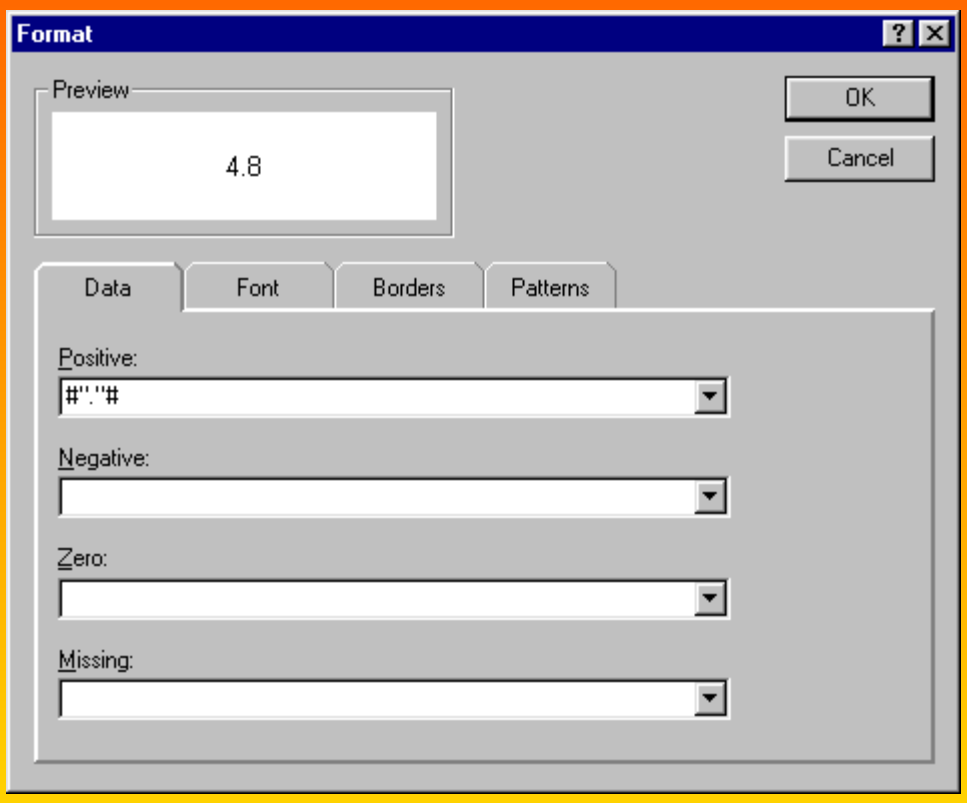
Your data item for SSN now looks like this.



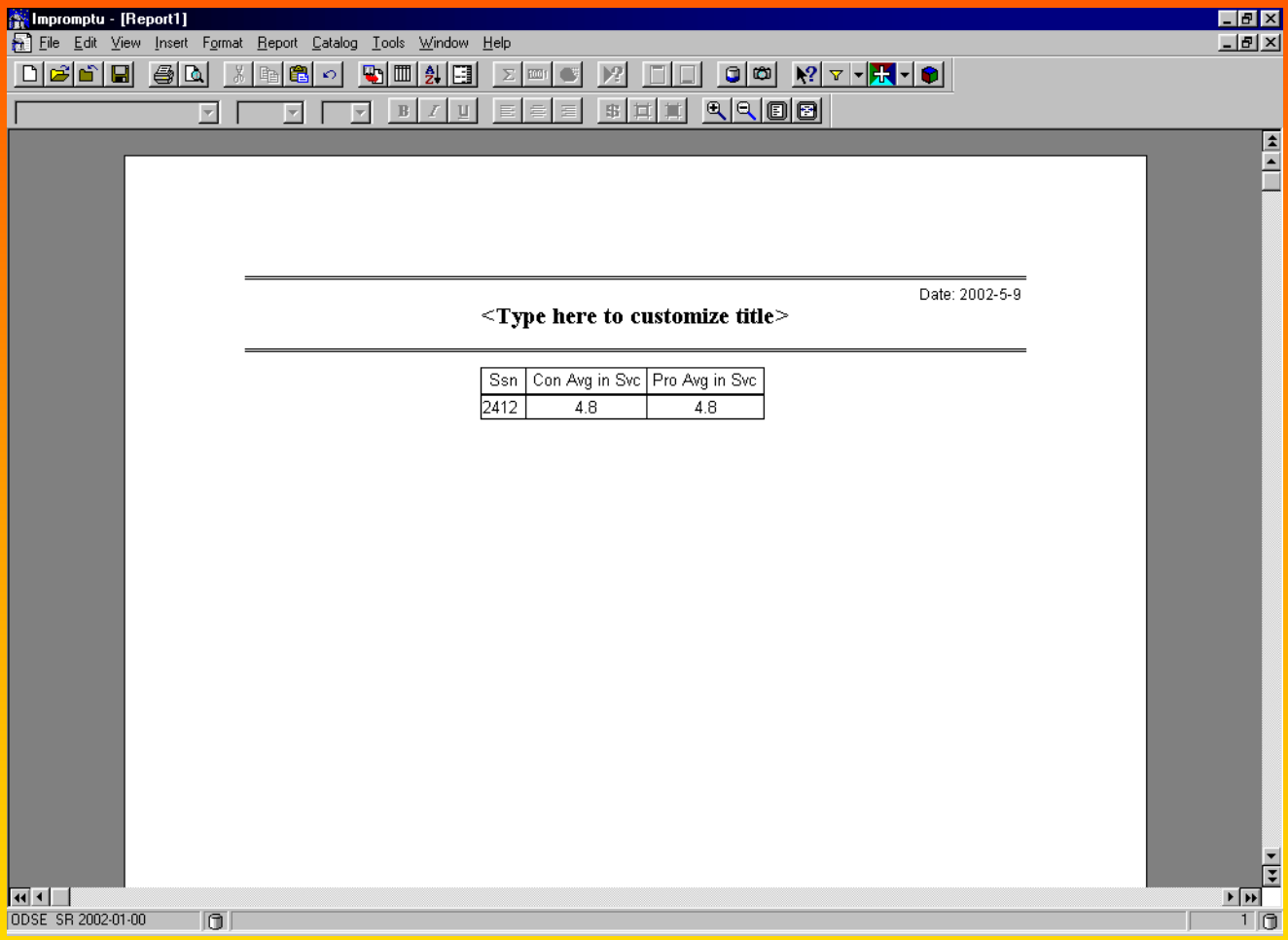
Lets format the pro con marks to include a decimal point between the data. If you pull down this data item it does not have this included. So 4.8 look like 48



Change the positive line from general to #”.”#
The quotation will insert what ever is between the quotations into the data.



Your report will look like this.



Chapter 7

There are several options for formatting a report. The Step-by-Step Impromptu Report guide, chapter 18 (Format Data) is an awesome reference!

Chapter 8

Intermediate Reports and Advanced Reports

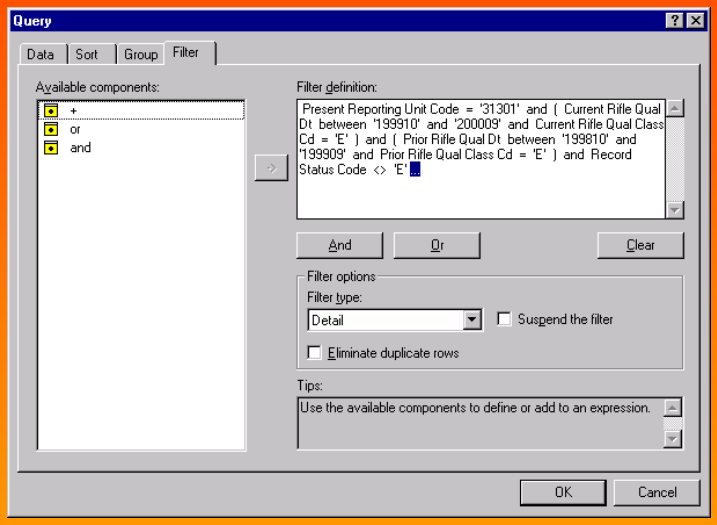
Chapter 8

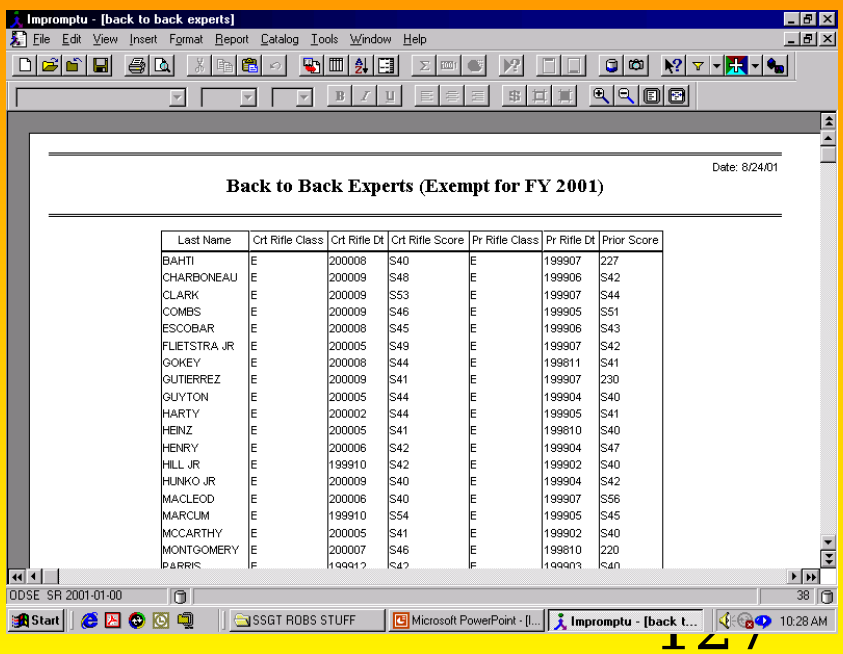
Intermediate & Advanced Reports

The purpose of this chapter is to show intermediate and advance filters and give an example of what the report would look like.

Intermediate & Advanced Reports

This filter and report shows the members within a RUC that have 2 consecutive expert rifle qualifications. This filter/report can be changed to provide the same information for pistol.

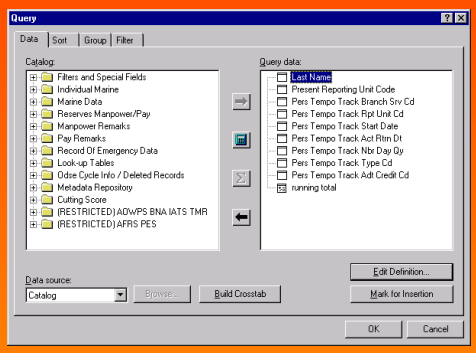


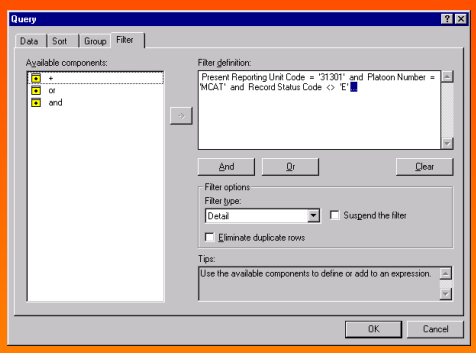


Last Name	Crt Rifle Class	Crt Rifle Dt	Crt Rifle Score	Pr Rifle Class	Pr Rifle Dt	Prior Score
BAHTI	E	200008	S40	E	199907	227
CHARBONEAU	E	200009	S48	E	199906	S42
CLARK	E	200009	S53	E	199907	S44
COMBS	E	200009	S46	E	199905	S51
ESCOBAR	E	200008	S45	E	199906	S43
FLIETSTRA JR	E	200005	S49	E	199907	S42
GOKEY	E	200008	S44	E	199811	S41
GUTIERREZ	E	200009	S41	E	199907	230
GUYTON	E	200005	S44	E	199904	S40
HARTY	E	200002	S44	E	199905	S41
HEINZ	E	200005	S41	E	199810	S40
HENRY	E	200006	S42	E	199904	S47
HILL JR	E	199910	S42	E	199902	S40
HUNKO JR	E	200009	S40	E	199904	S42
MACLEOD	E	200006	S40	E	199907	S56
MARCUM	E	199910	S54	E	199905	S45
MCCARTHY	E	200005	S41	E	199902	S40
MONTGOMERY	E	200007	S46	E	199810	220
PARRIS	E	199912	S42	E	199903	S40

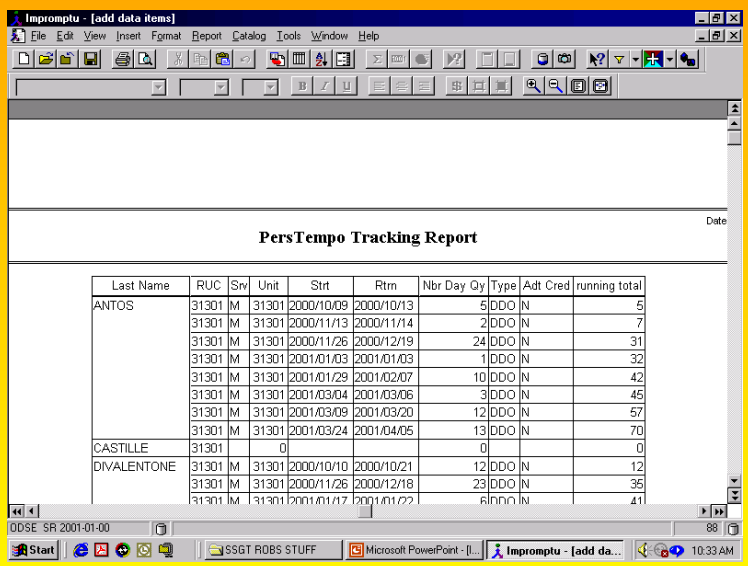
Chapter 8

Intermediate & Advanced Reports



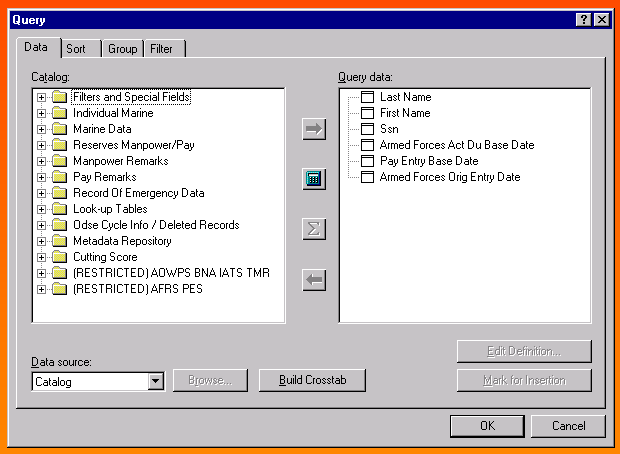


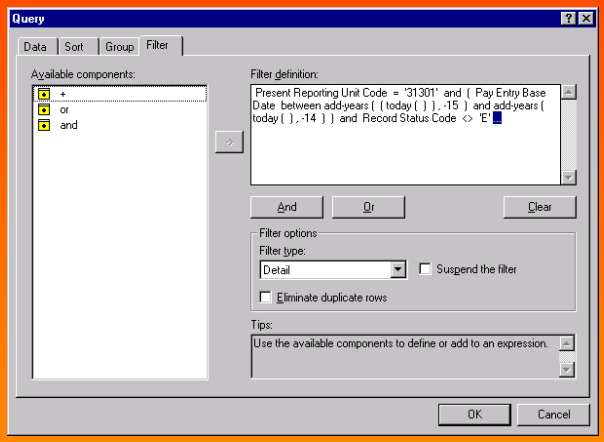
With a running-total (see chapter 6), a good Group and a basic filter, you can get a smart report that tracks data for you.



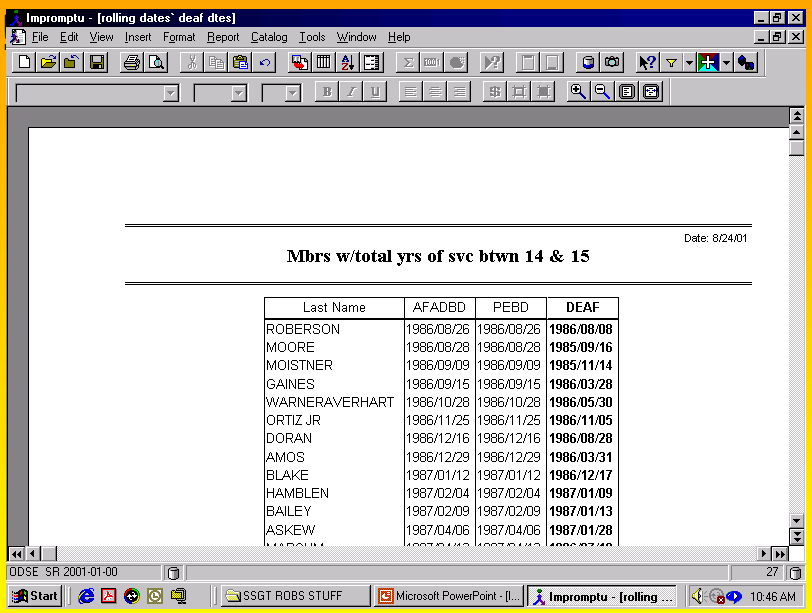
Chapter 8

Intermediate & Advanced Reports





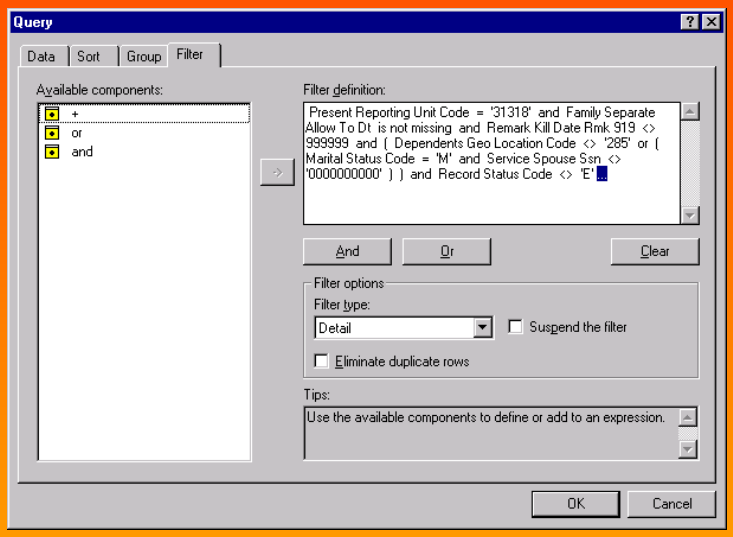
With a basic Data tab and using Functions within your Filter tab, you can produce a time saving report that does not have to be re-filtered every time you go into it, but gives you the most recent information every time you access it.

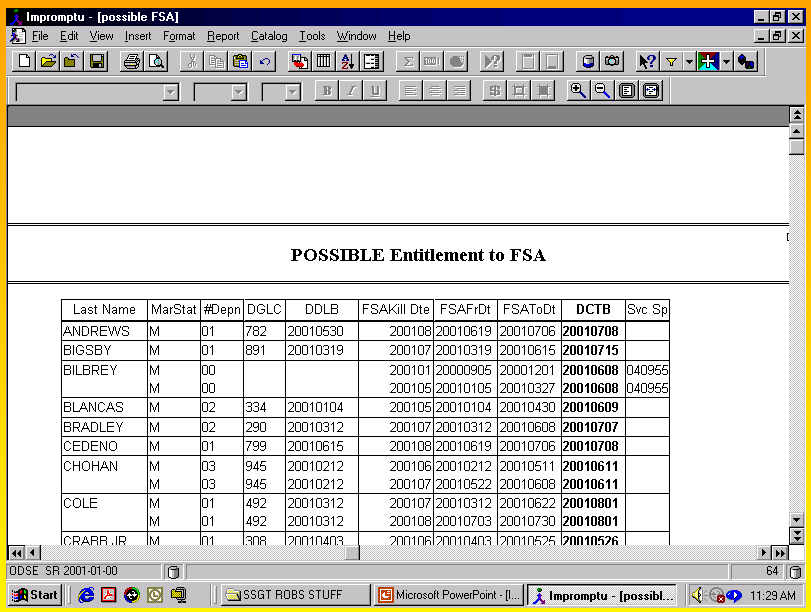


Intermediate & Advanced Reports

This filter has parenthesis, which tells Impromptu to look at the expressions inside the parenthesis first.

Members with Svc Spouses may still be entitled to FSA (DODFMR Chpt 27), so we must ID them in the filter. Then we have to ID the family members who are not in the local area, RUC 31318 DGLC is 285. A Kill date of 999999 represents an open MCTFS remark, also when we ask for To Dates that are not missing, we get the member with closed remarks.

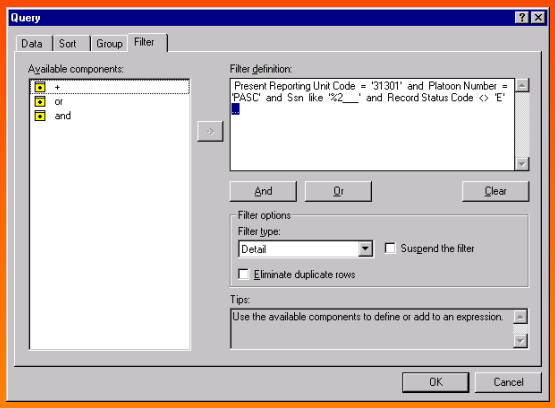




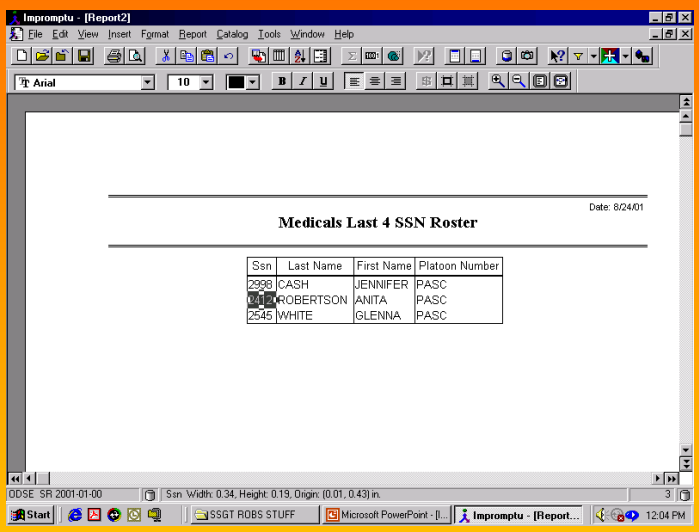
Last Name	MarStat	#Depn	DGLC	DDLB	FSAKill Dte	FSAFrDt	FSAToDt	DCTB	Svc Sp
ANDREWS	M	01	782	20010530	200108	20010619	20010706	**20010708**	
BIGSBY	M	01	891	20010319	200107	20010319	20010615	**20010715**	
BILBREY	M	00			200101	20000905	20001201	**20010608**	040955
	M	00			200105	20010105	20010327	**20010608**	040955
BLANCAS	M	02	334	20010104	200105	20010104	20010430	**20010609**	
BRADLEY	M	02	290	20010312	200107	20010312	20010608	**20010707**	
CEDENO	M	01	799	20010615	200108	20010619	20010706	**20010708**	
CHOHAN	M	03	945	20010212	200106	20010212	20010511	**20010611**	
	M	03	945	20010212	200107	20010522	20010608	**20010611**	
COLE	M	01	492	20010312	200107	20010312	20010622	**20010801**	
	M	01	492	20010312	200108	20010703	20010730	**20010801**	
CRARR JR	M	01	308	20010403	200106	20010403	20010525	**20010526**	

Chapter 8

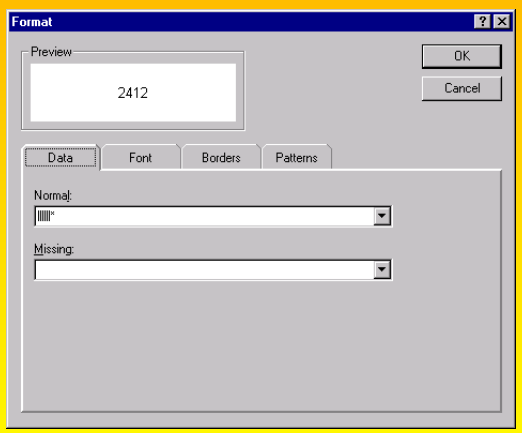
Intermediate & Advanced Reports



In this filter we asked for all the members within 31301, platoon PASC that had a SSN with the last four starting with 2.



Refer back to Chapter 3 for the SSN expression. The report will look like this. But the SSN column will list the entire SSN. For Privacy Act purposes, lets cut the SSN columns down to the last four digits. This is done by right clicking on one of the SSN's and selecting FORMAT, you will get this window. In the Data tab, under Normal type |||||*



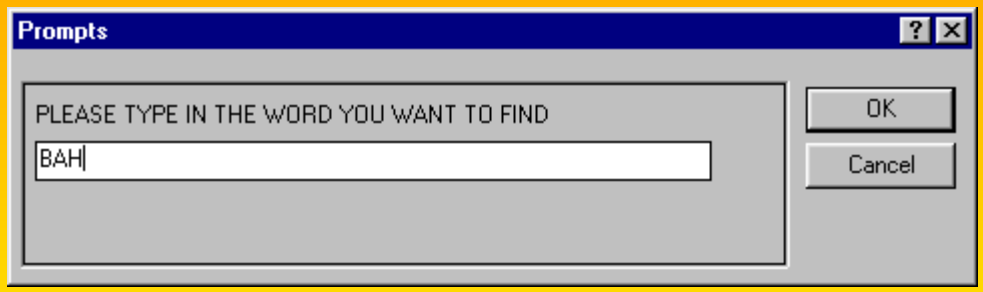
Intermediate & Advanced Reports

This report will display a type impromptu. It will then find the field location in ODSE and the file source (i.e. if SSN is input it will display the location of all fields in ODSE containing SSN and the source file name and location (SSN, MCTFS Master)

You are first prompted to input the field that you are looking for. This report is case sensitive.

YOU MUST USE ALL CAPS!

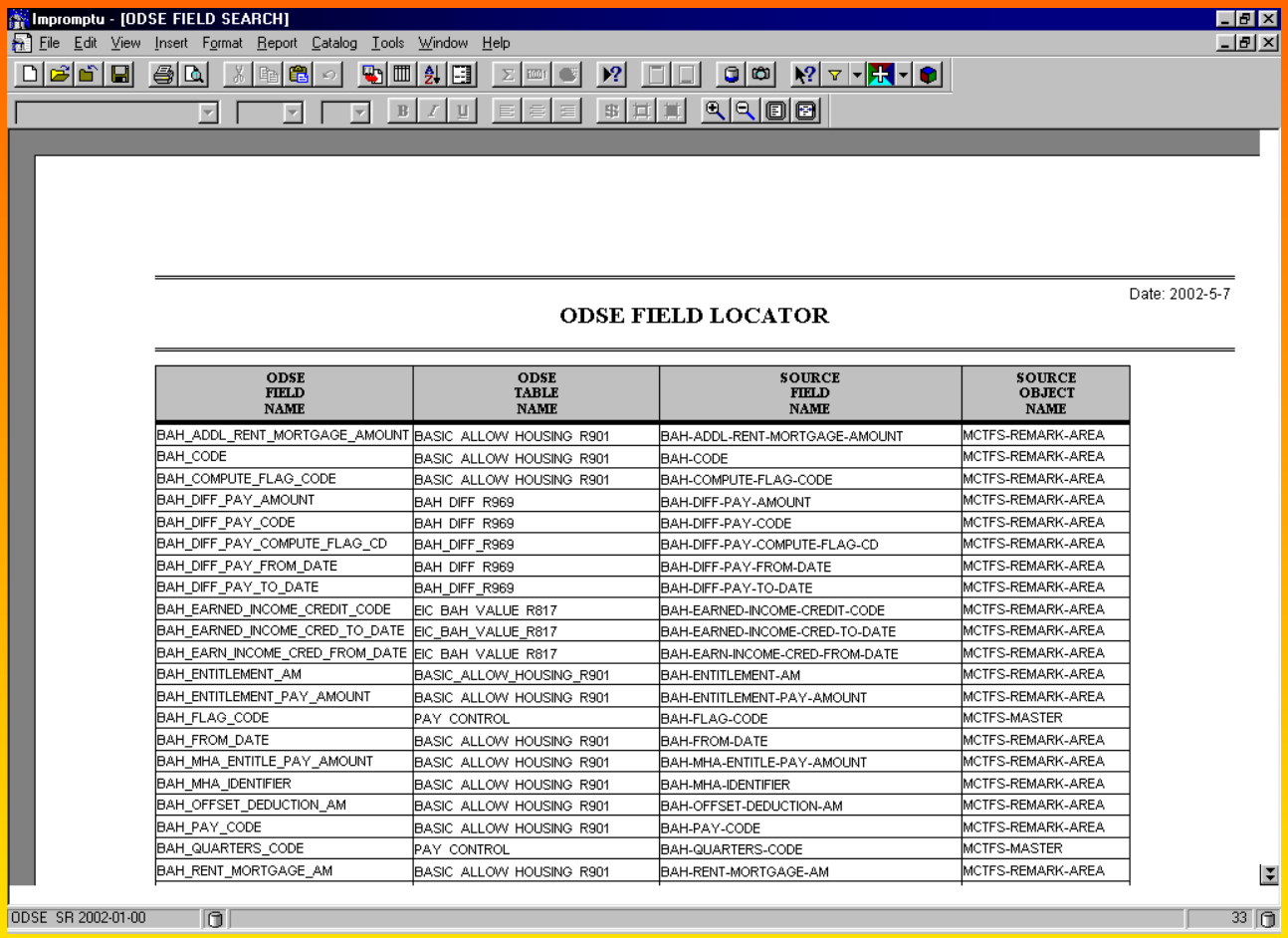
Lets use BAH



Intermediate & Advanced Reports

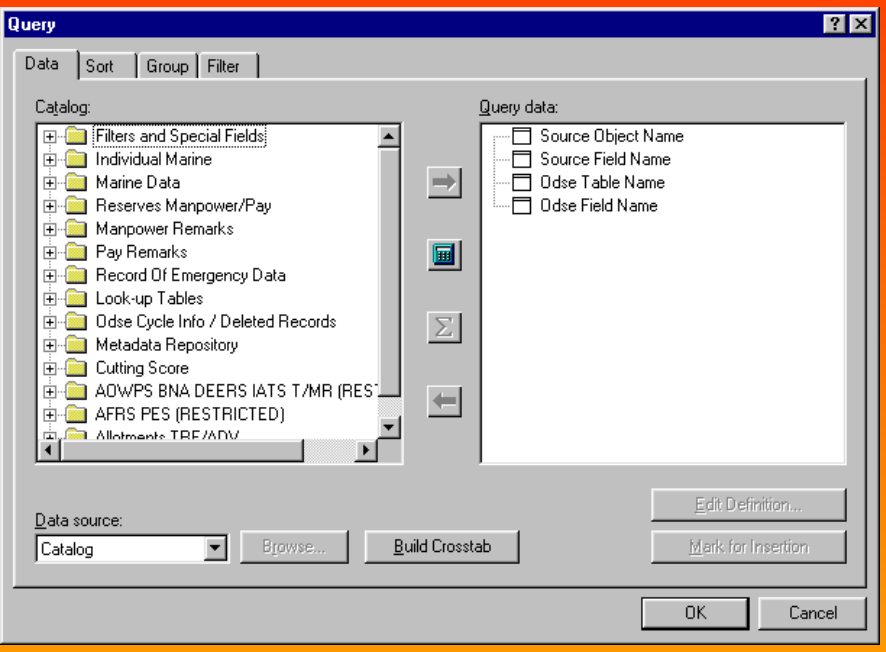
The report will look like this.

This is an awesome report building tool!



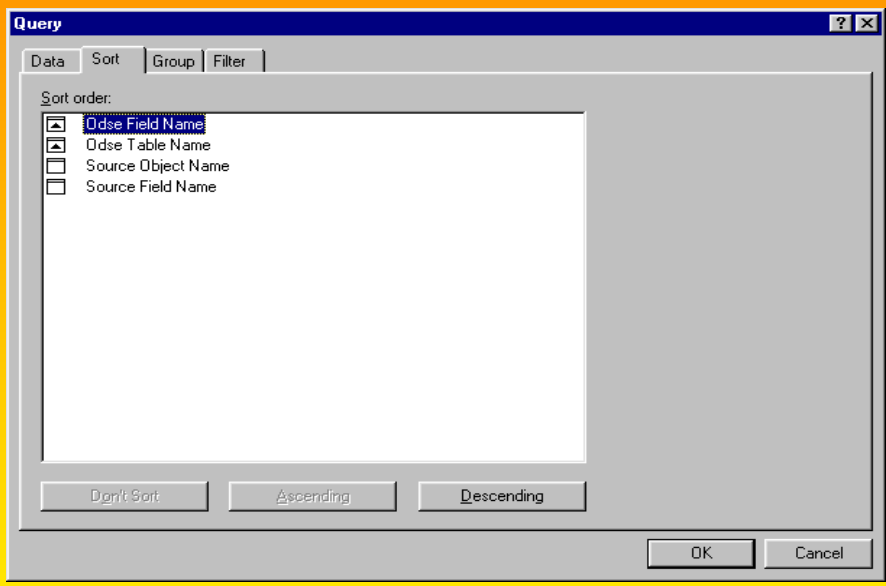
ODSE FIELD NAME	ODSE TABLE NAME	SOURCE FIELD NAME	SOURCE OBJECT NAME
BAH_ADDL_RENT_MORTGAGE_AMOUNT	BASIC_ALLOW_HOUSING_R901	BAH-ADDL-RENT-MORTGAGE-AMOUNT	MCTFS-REMARK-AREA
BAH_CODE	BASIC_ALLOW_HOUSING_R901	BAH-CODE	MCTFS-REMARK-AREA
BAH_COMPUTE_FLAG_CODE	BASIC_ALLOW_HOUSING_R901	BAH-COMPUTE-FLAG-CODE	MCTFS-REMARK-AREA
BAH_DIFF_PAY_AMOUNT	BAH_DIFF_R969	BAH-DIFF-PAY-AMOUNT	MCTFS-REMARK-AREA
BAH_DIFF_PAY_CODE	BAH_DIFF_R969	BAH-DIFF-PAY-CODE	MCTFS-REMARK-AREA
BAH_DIFF_PAY_COMPUTE_FLAG_CD	BAH_DIFF_R969	BAH-DIFF-PAY-COMPUTE-FLAG-CD	MCTFS-REMARK-AREA
BAH_DIFF_PAY_FROM_DATE	BAH_DIFF_R969	BAH-DIFF-PAY-FROM-DATE	MCTFS-REMARK-AREA
BAH_DIFF_PAY_TO_DATE	BAH_DIFF_R969	BAH-DIFF-PAY-TO-DATE	MCTFS-REMARK-AREA
BAH_EARNED_INCOME_CREDIT_CODE	EIC_BAH_VALUE_R817	BAH-EARNED-INCOME-CREDIT-CODE	MCTFS-REMARK-AREA
BAH_EARNED_INCOME_CRED_TO_DATE	EIC_BAH_VALUE_R817	BAH-EARNED-INCOME-CRED-TO-DATE	MCTFS-REMARK-AREA
BAH_EARN_INCOME_CRED_FROM_DATE	EIC_BAH_VALUE_R817	BAH-EARN-INCOME-CRED-FROM-DATE	MCTFS-REMARK-AREA
BAH_ENTITLEMENT_AM	BASIC_ALLOW_HOUSING_R901	BAH-ENTITLEMENT-AM	MCTFS-REMARK-AREA
BAH_ENTITLEMENT_PAY_AMOUNT	BASIC_ALLOW_HOUSING_R901	BAH-ENTITLEMENT-PAY-AMOUNT	MCTFS-REMARK-AREA
BAH_FLAG_CODE	PAY_CONTROL	BAH-FLAG-CODE	MCTFS-MASTER
BAH_FROM_DATE	BASIC_ALLOW_HOUSING_R901	BAH-FROM-DATE	MCTFS-REMARK-AREA
BAH_MHA_ENTITLE_PAY_AMOUNT	BASIC_ALLOW_HOUSING_R901	BAH-MHA-ENTITLE-PAY-AMOUNT	MCTFS-REMARK-AREA
BAH_MHA_IDENTIFIER	BASIC_ALLOW_HOUSING_R901	BAH-MHA-IDENTIFIER	MCTFS-REMARK-AREA
BAH_OFFSET_DEDUCTION_AM	BASIC_ALLOW_HOUSING_R901	BAH-OFFSET-DEDUCTION-AM	MCTFS-REMARK-AREA
BAH_PAY_CODE	BASIC_ALLOW_HOUSING_R901	BAH-PAY-CODE	MCTFS-REMARK-AREA
BAH_QUARTERS_CODE	PAY_CONTROL	BAH-QUARTERS-CODE	MCTFS-MASTER
BAH_RENT_MORTGAGE_AM	BASIC_ALLOW_HOUSING_R901	BAH-RENT-MORTGAGE-AM	MCTFS-REMARK-AREA

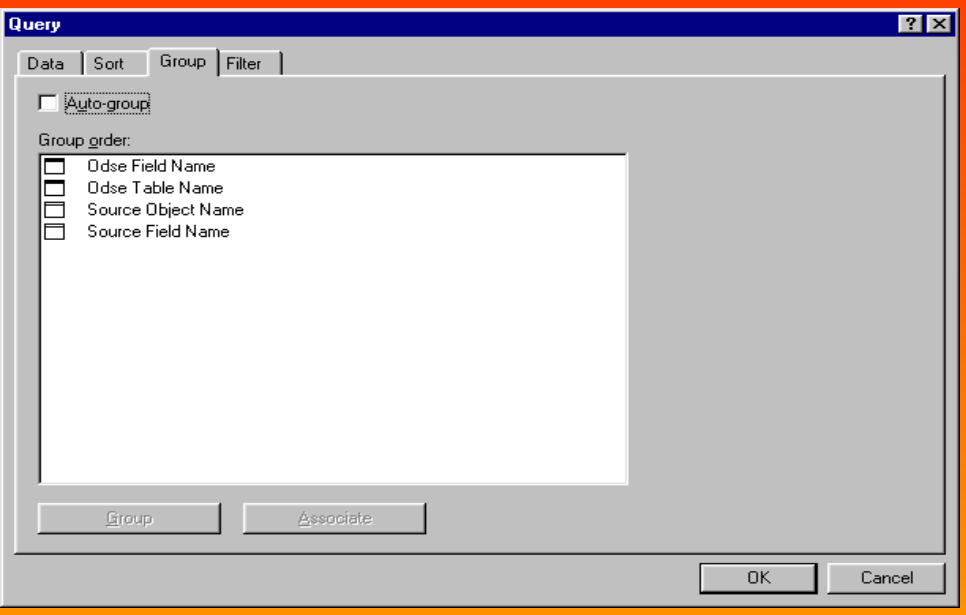
Lets see how it was built!



The fields within the Data tab are from the Metadata Repository Folder.

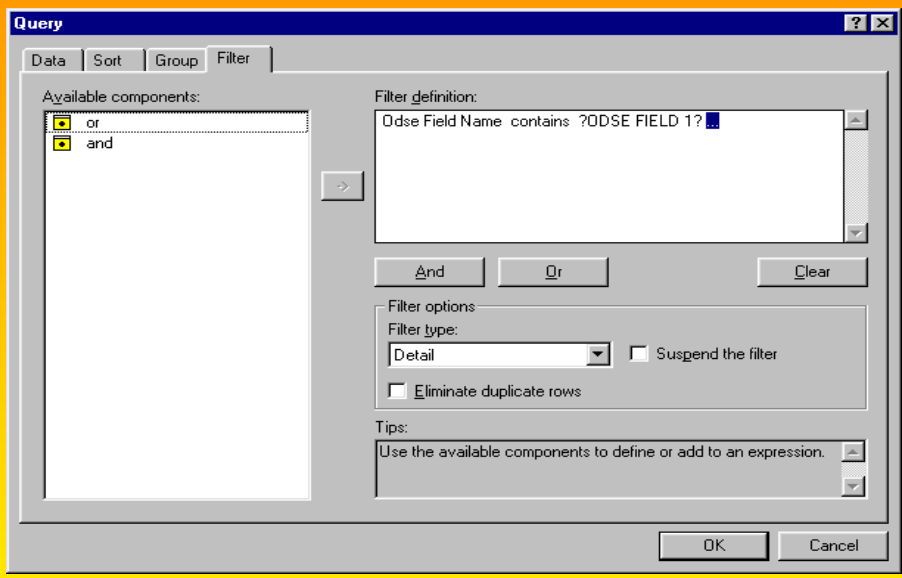
The Sort tab should look like this.





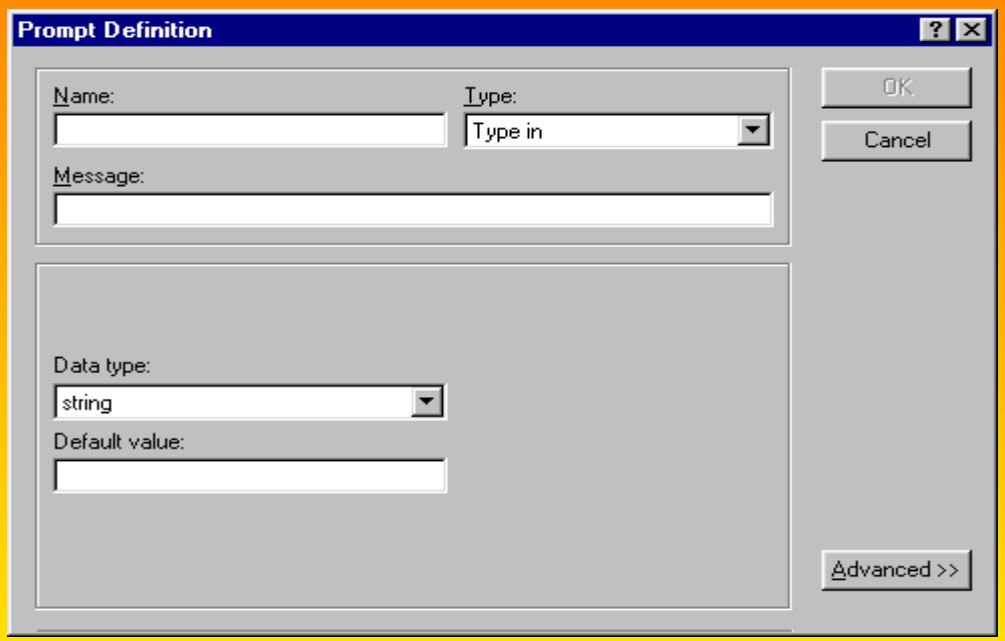
The Group tab should look like this.

The Filter tab uses Prompt Manager. That is what prompted you for the field 'keyword' when you went into the report. Lets build this prompt

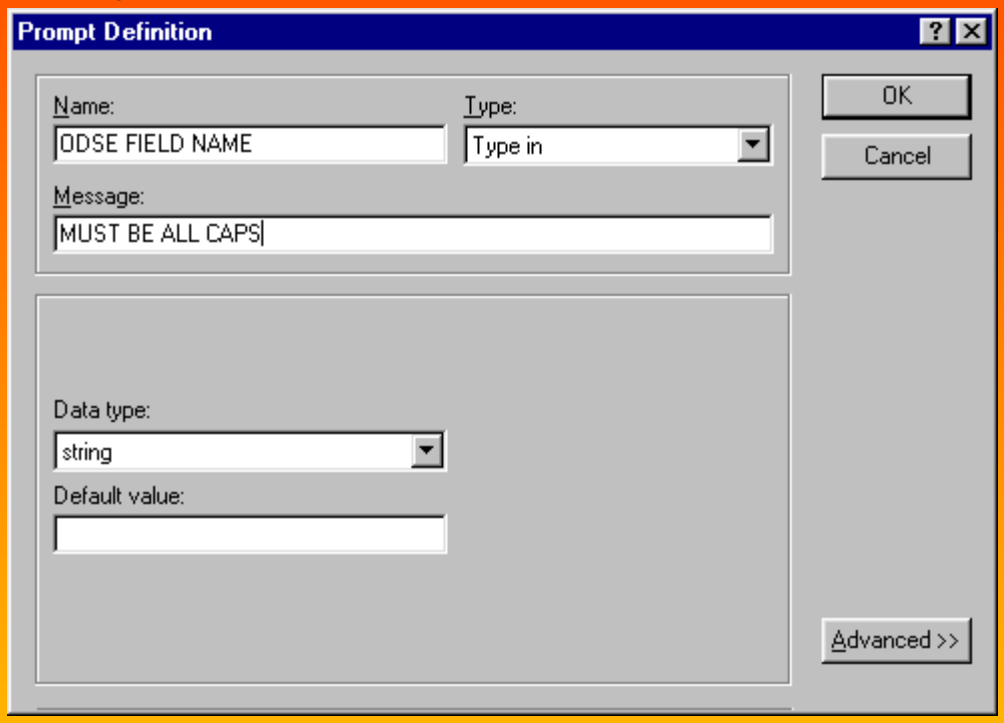


From the Filter tab, find the field that you desire to build a Prompt for. We can go back into the Report column for this. And double click on 'ODSE field name' then double click on contains because this operator will tell Oracle to look for that string of letters, no matter of location in the field name. Now double click on Prompt Manager. This will bring up the Prompt Definition window.

It will look like this.



In the name block, simply give your field a name, it can match the name of the field.



For type, it can remain 'type in' because we want to type in different field key words on the prompt.

A message is not necessary for this block, but since we know that it has to be all CAPs, lets go ahead and put that in the message!

Now click on OK, you have just built your prompt.

Chapter 9

Templates

Chapter 9

Templates

Templates only store formatting and placeholders. They can save you time and help you produce reports and letters that are consistent with your units standards. Templates also simplify the process for creating new reports. If Impromptu contained no templates, you would start with a blank report and add frames every time you wanted to create a report. For example, a mailing label allows you to take data from your Commanders Unit Diary Database (CUDDB) or ODSE and place it in a format of a mailing address vice a list report. You can save your report as a template to make it easier to update the report next time you access it.

Chapter 9

Templates

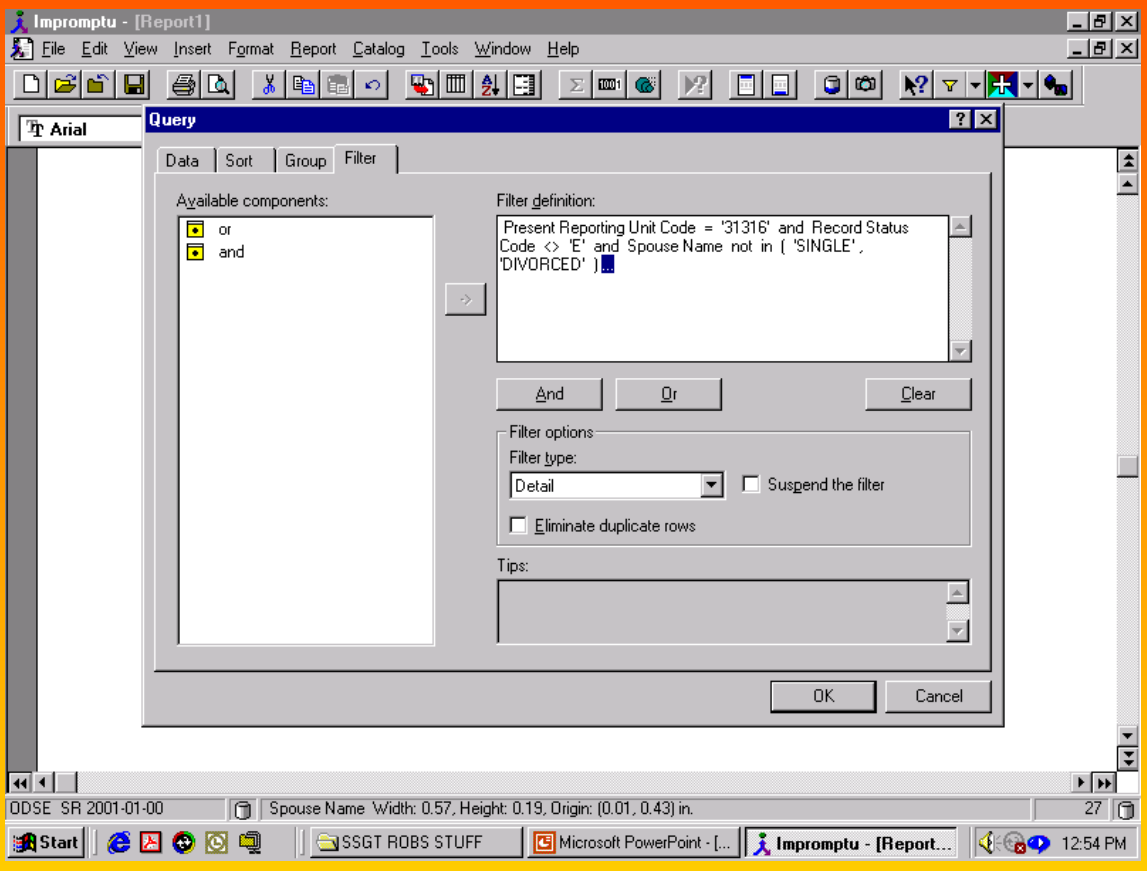
Before you can apply your template, you should build your list report as normal. When you are sure that your are retrieving the appropriate data, then apply the information to a template.

Lets build a list report of all the married Marines within a RUC to include the spouses name and the address for the spouse then apply it to a template so we can print off mailing labels.

Chapter 9

Templates

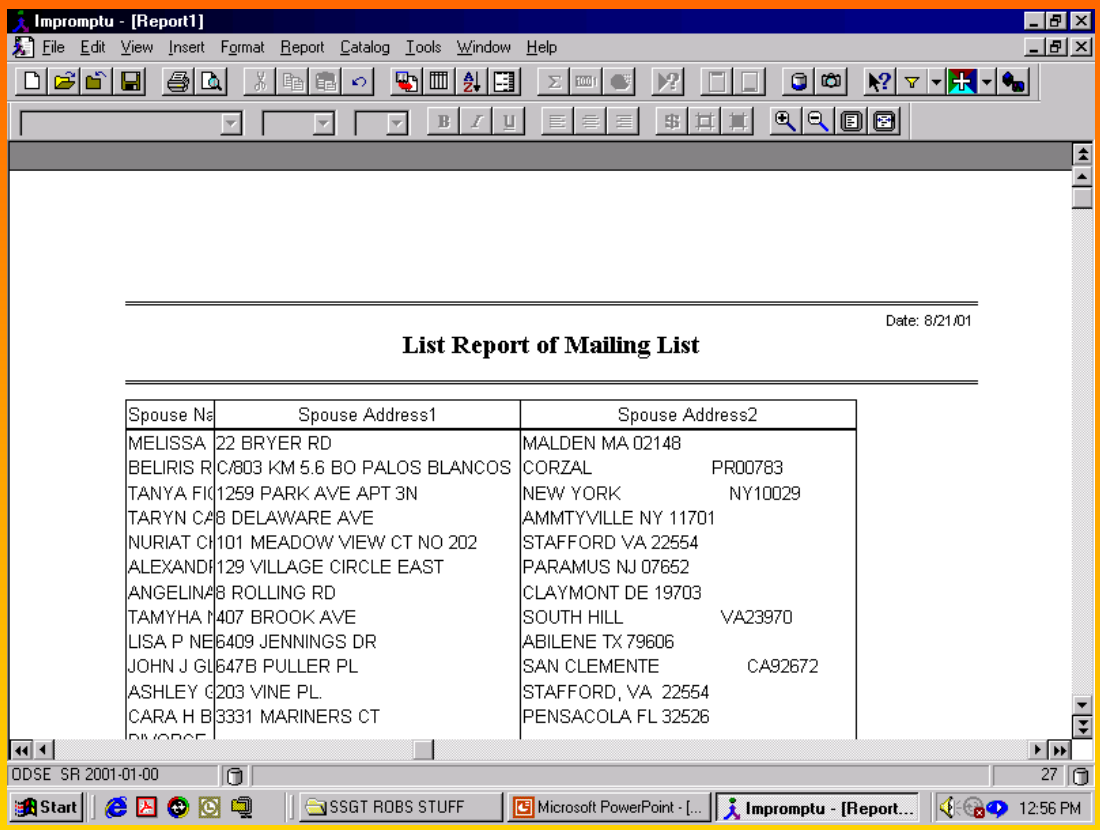
Build your report as normal...



Chapter 9

Templates

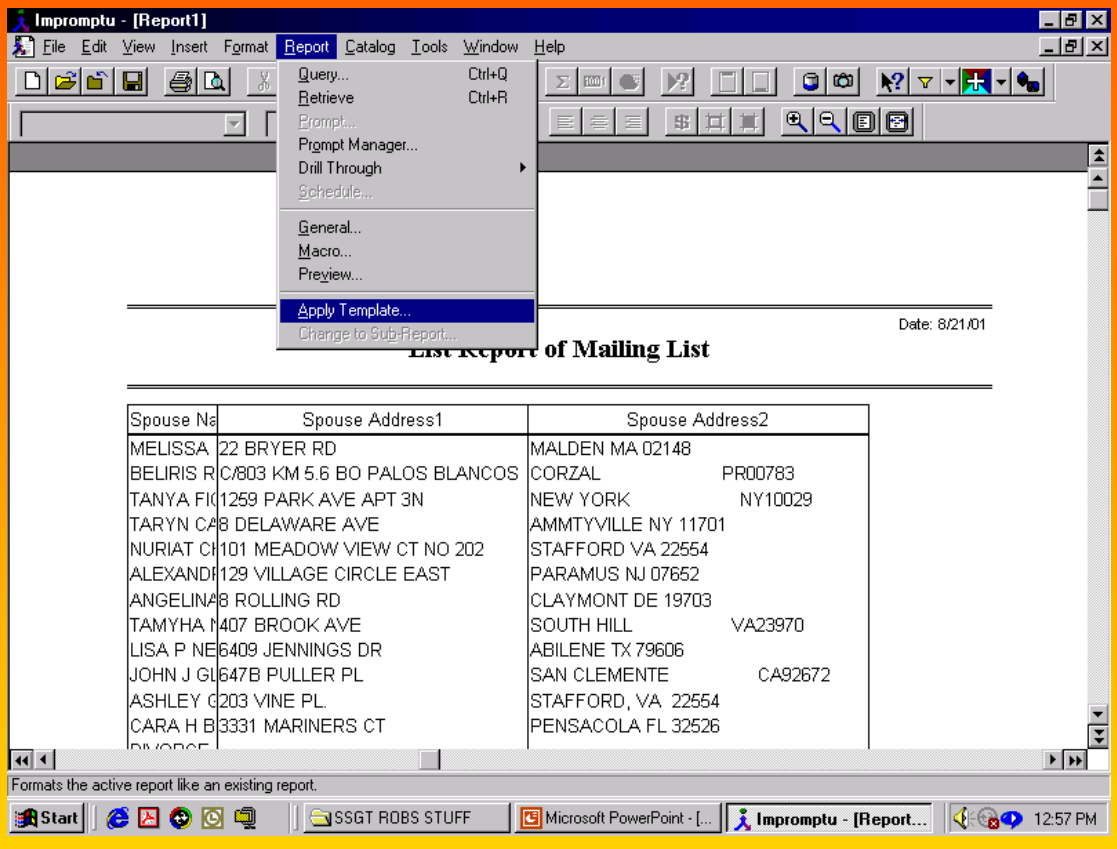
Your list report will look like this. Once you have decided this is the data you want, you can apply a template.



Chapter 9

Templates

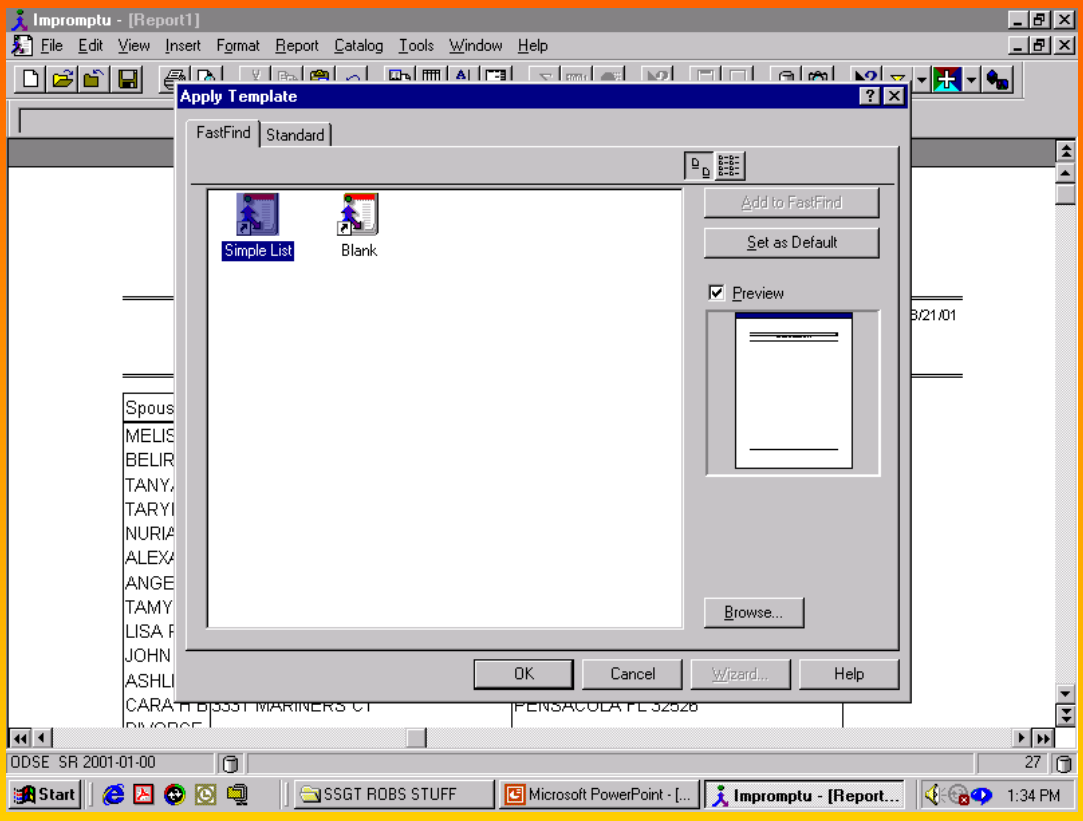
Click on report, then apply template.



Chapter 9

Templates

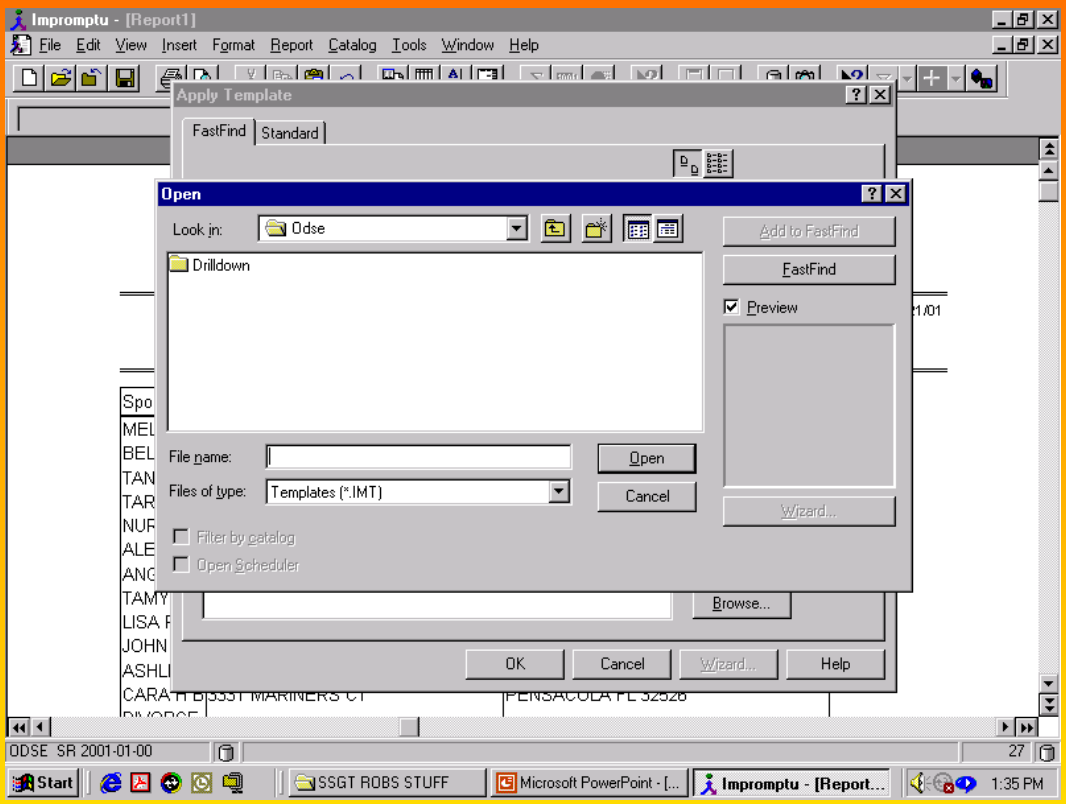
From this screen, click on the browse button.



Chapter 9

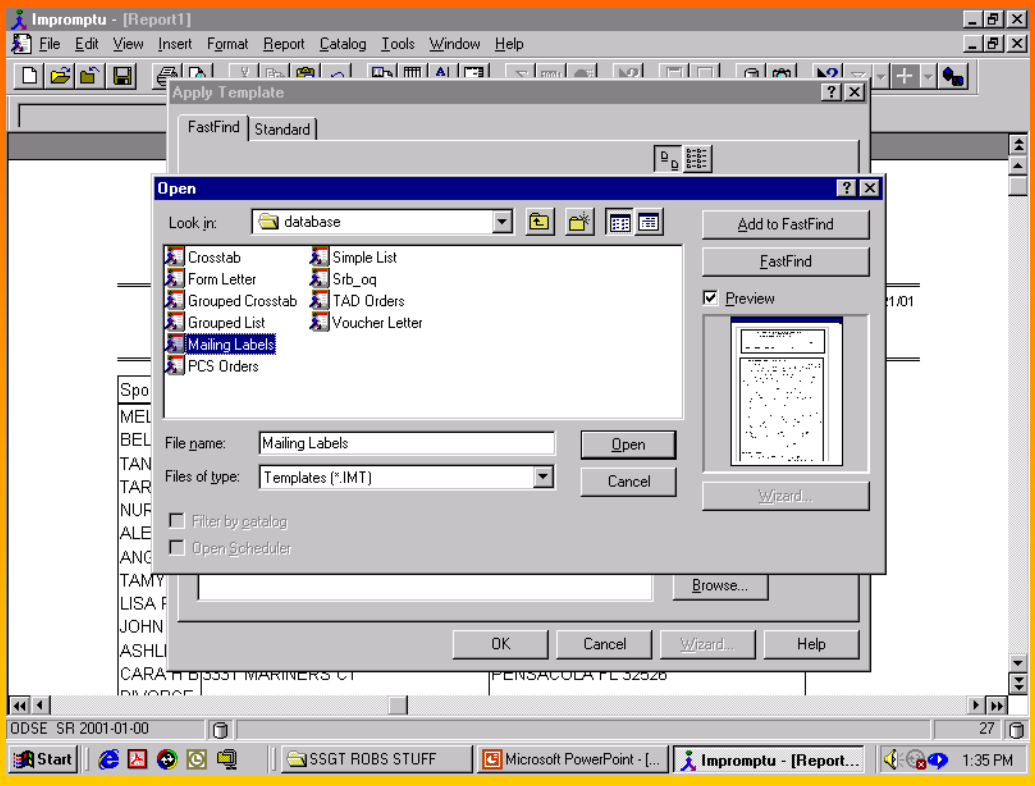
Templates

From the Open window, you should be able to go to the directory the templates are located in. If you do not have the templates, you can get them from your servicing MISSO.



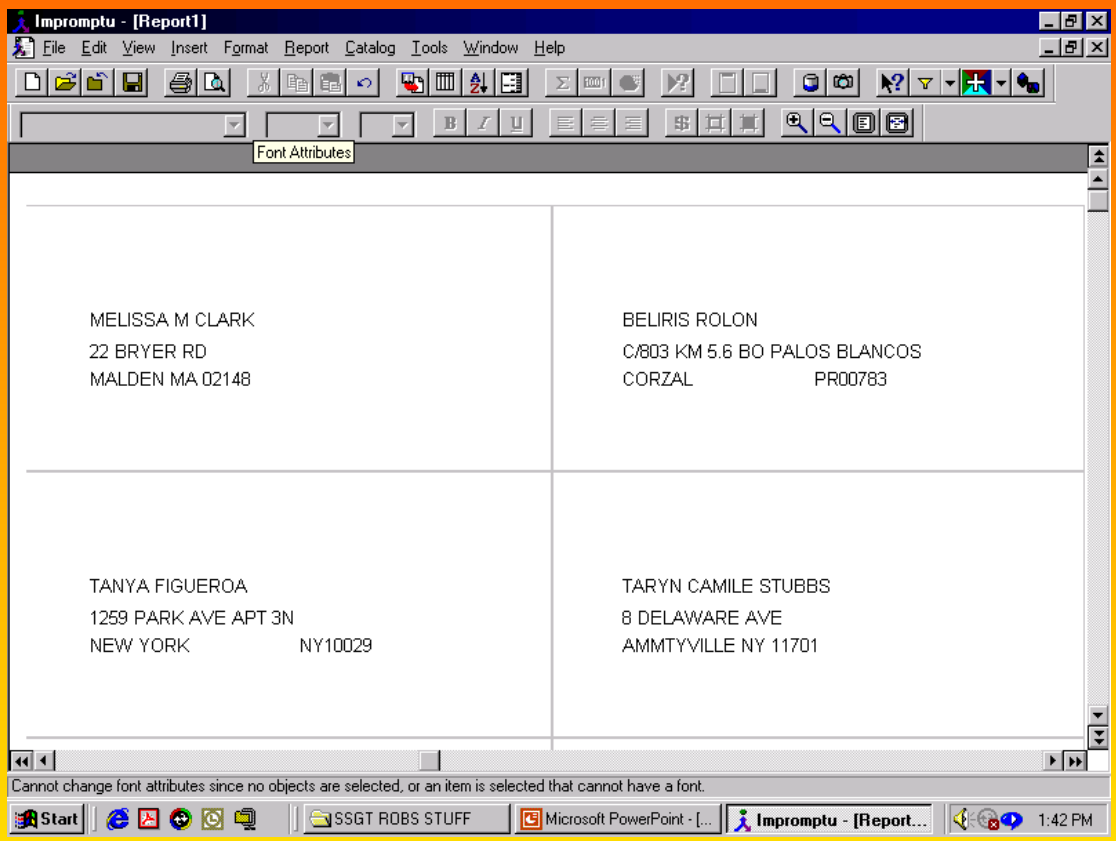
Templates

Once you are in your templates sub-directory, select mailing labels and click Open.



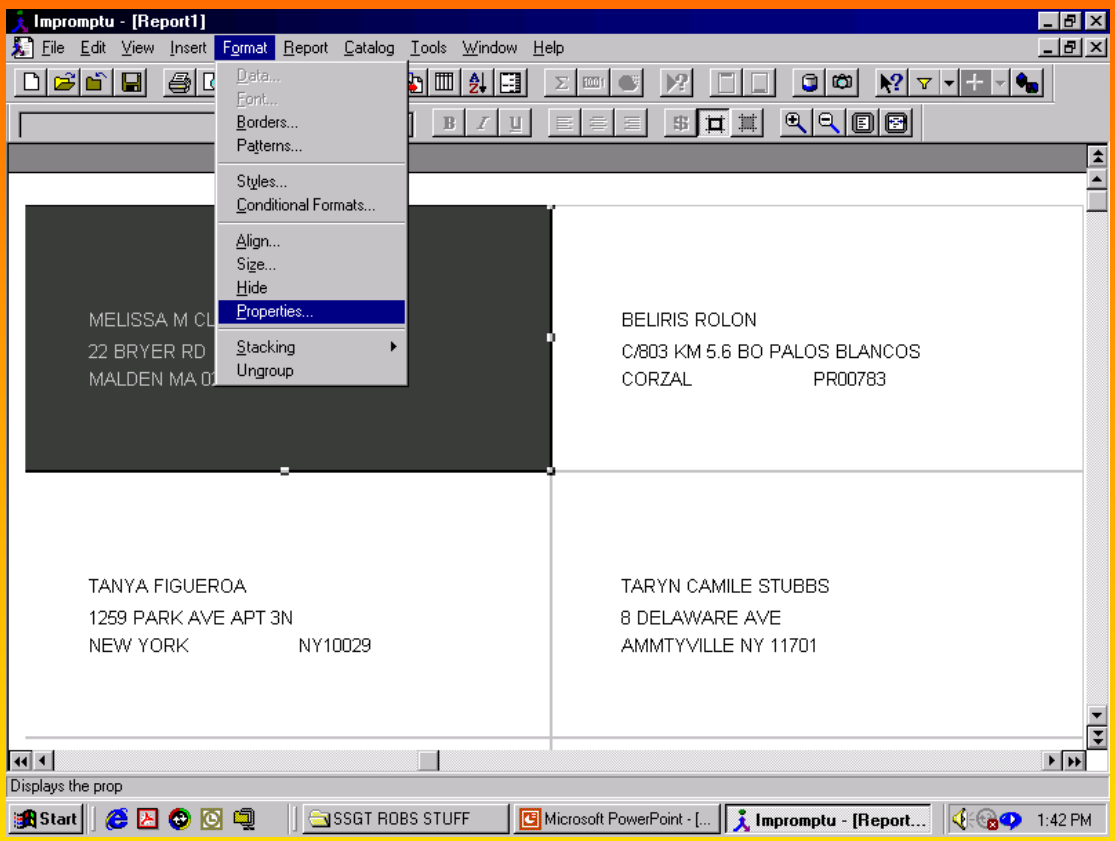
Templates

Now that you have the format set for the address, you have to change the properties so that they will print properly on your laser jet labels.



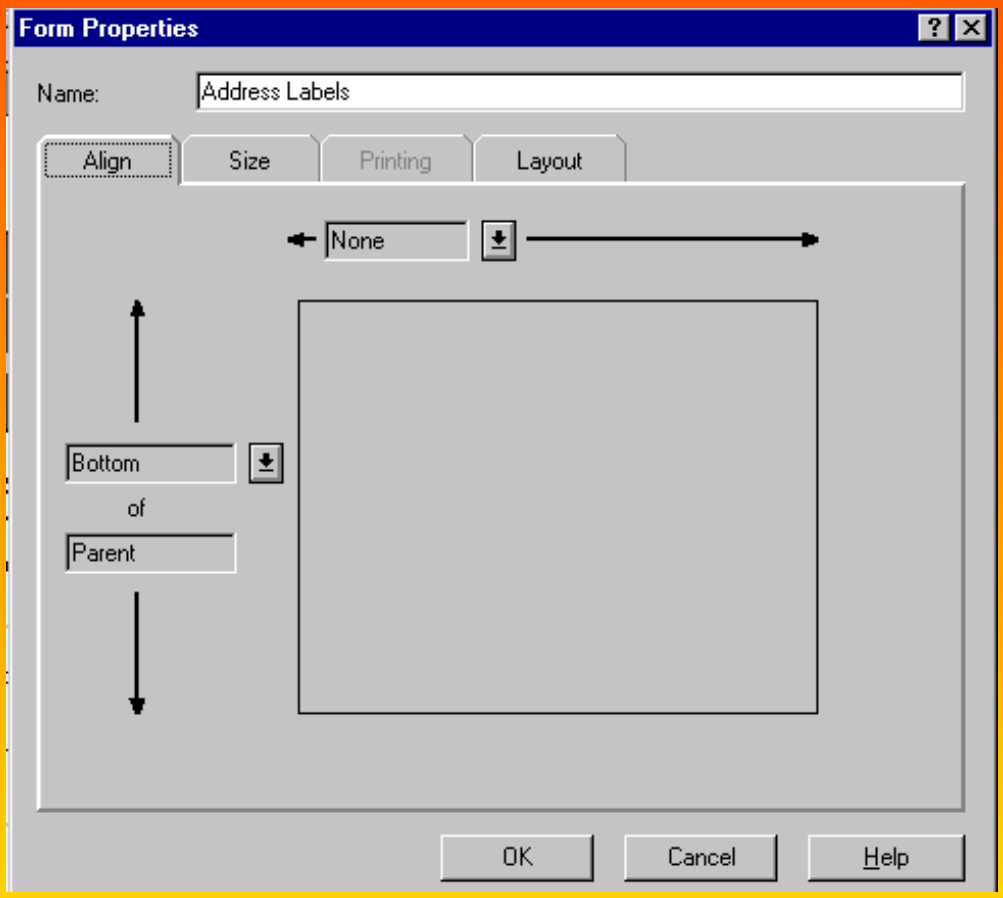
Templates

High-light one of the labels and then click on Format then Properties. This will allow you to set the properties for the labels.



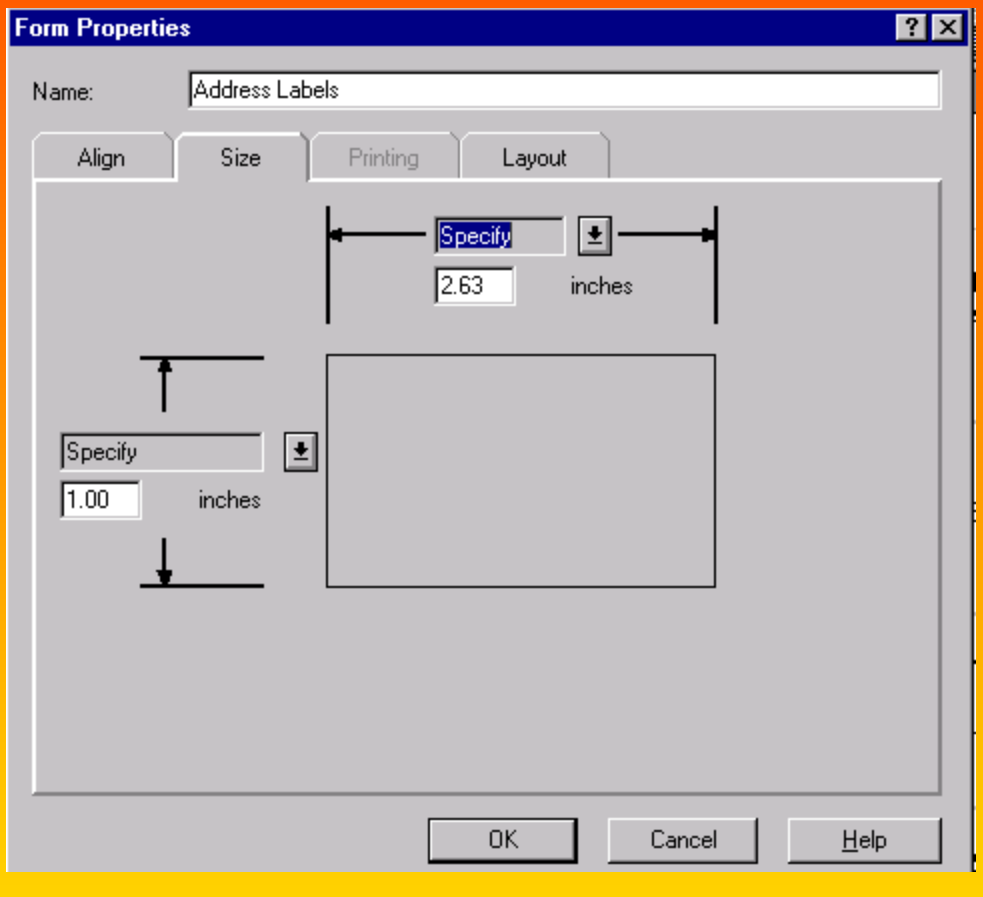
Templates

Ensure your Alignment tab look like this.



Templates

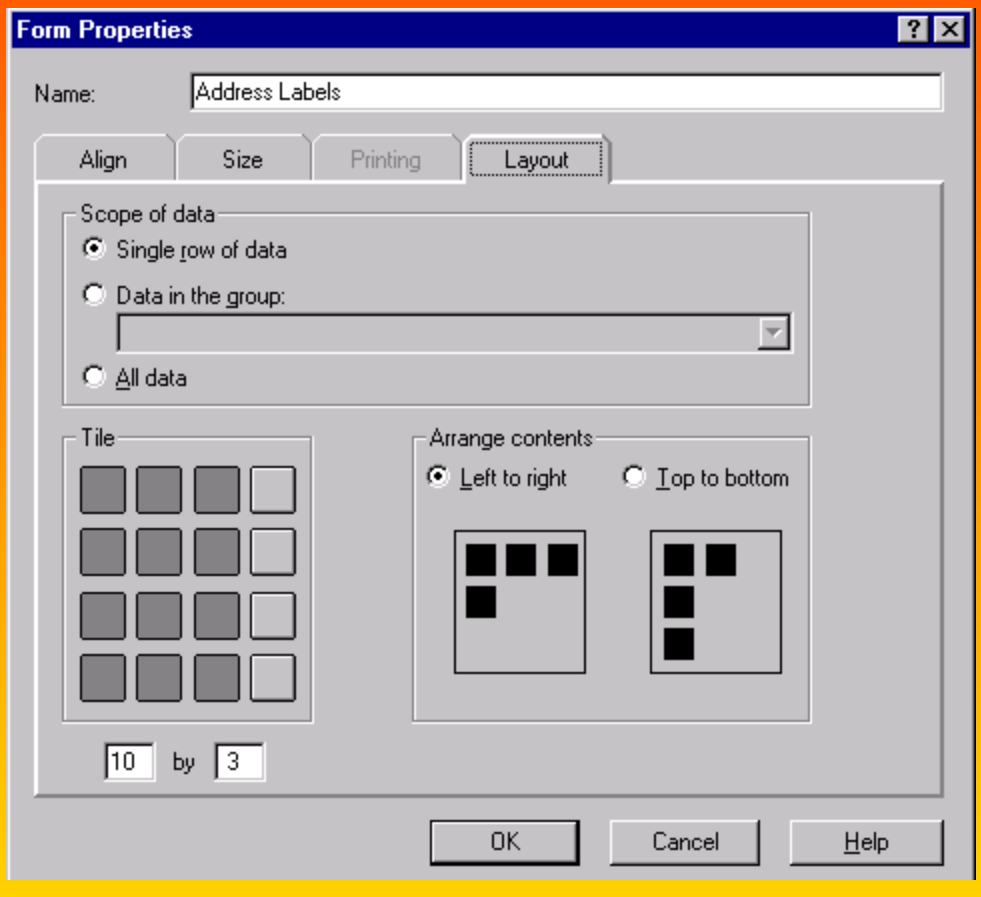
Ensure your Size tab look like this.



Chapter 9

Templates

Ensure your Layout tab look like this.



Templates

Now that your labels are in the right format, simply put your labels in the printer and print them on.

Chapter 9

Templates

Template can be applied to mailing labels, SRB/OQR labels, birthday letters, promotion letters, group orders, etc.

** Work smarter…not harder! **

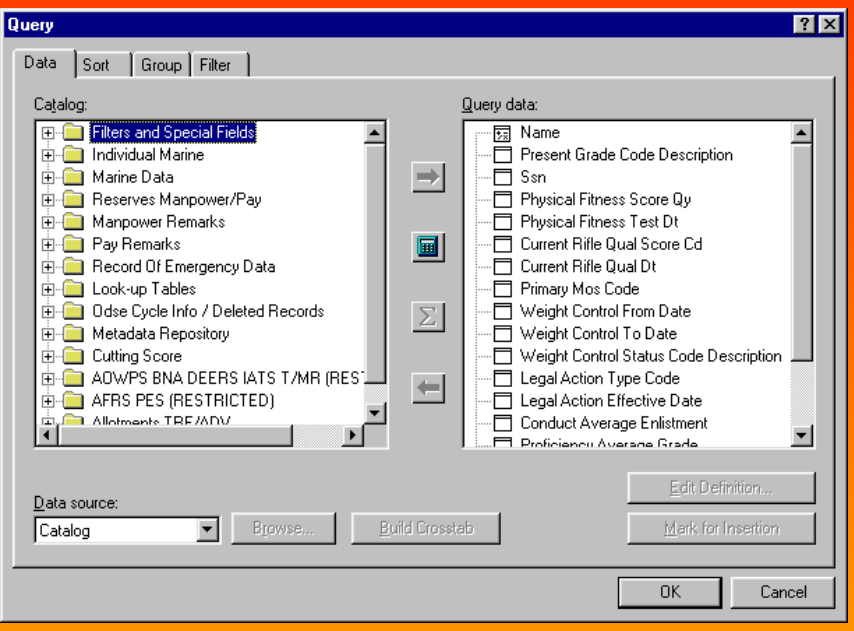
Chapter 9

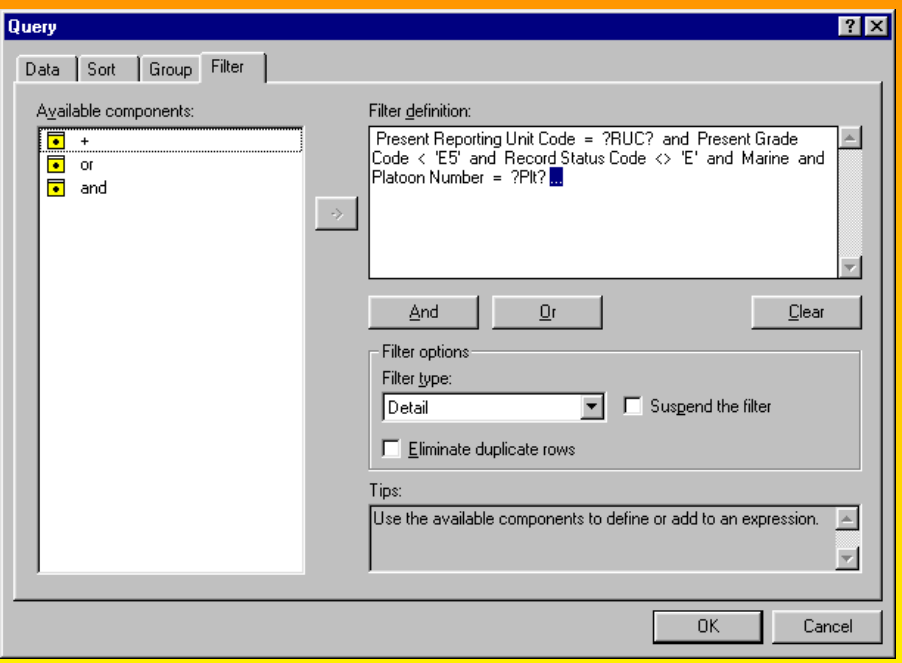
Templates

The following templates was created at a units request. It is a pro/con sheet. It provides the following information for each member that would rate pro/con for a specific section:
Name
Rank
SSN
PMOS
PFT / Date
Rifle / Date
Weight Control / Date
Legal Action / Date (NJP, Court Martial, etc)
Boards
As well as a section head comments area.

Templates

It is a basic report.



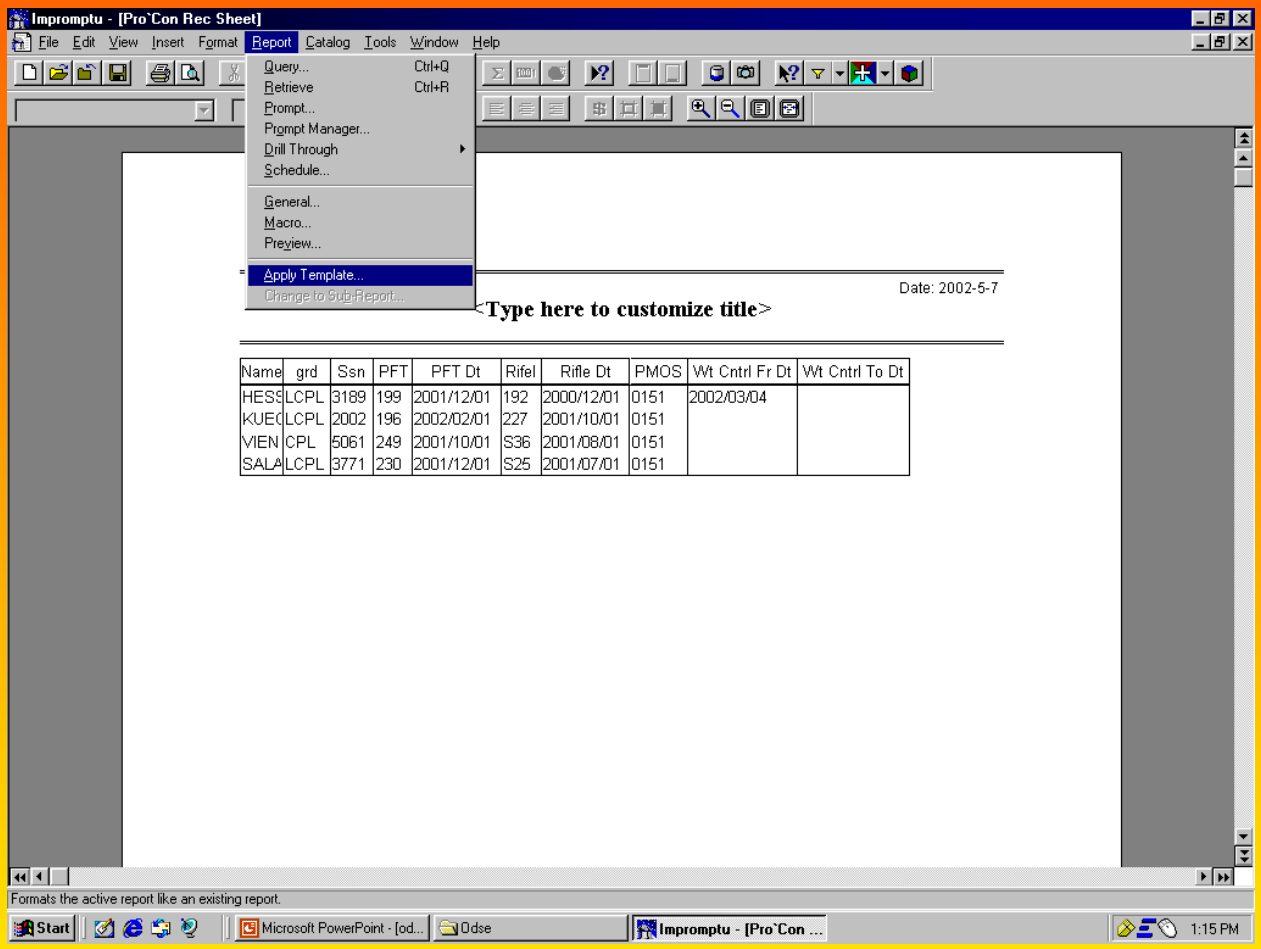


The data tab is simply a listing of the basic information. There is not a SORT or GROUP assigned and the filter has two prompts (see Chapter 8 for building a Prompt Manager) and an expression for only getting Marines that are Cpls and below.

Chapter 9

Templates

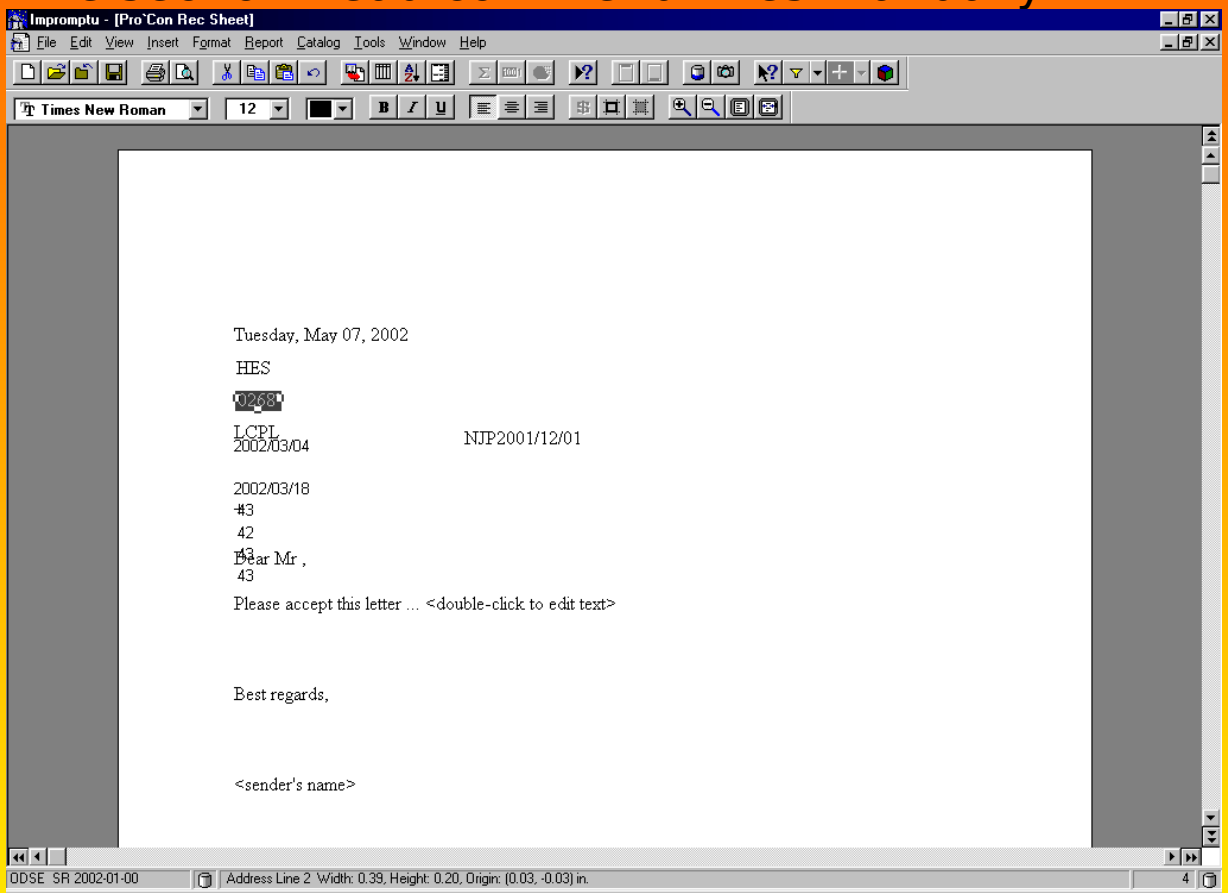
After the report is built, click on Report -> Apply template



Chapter 9

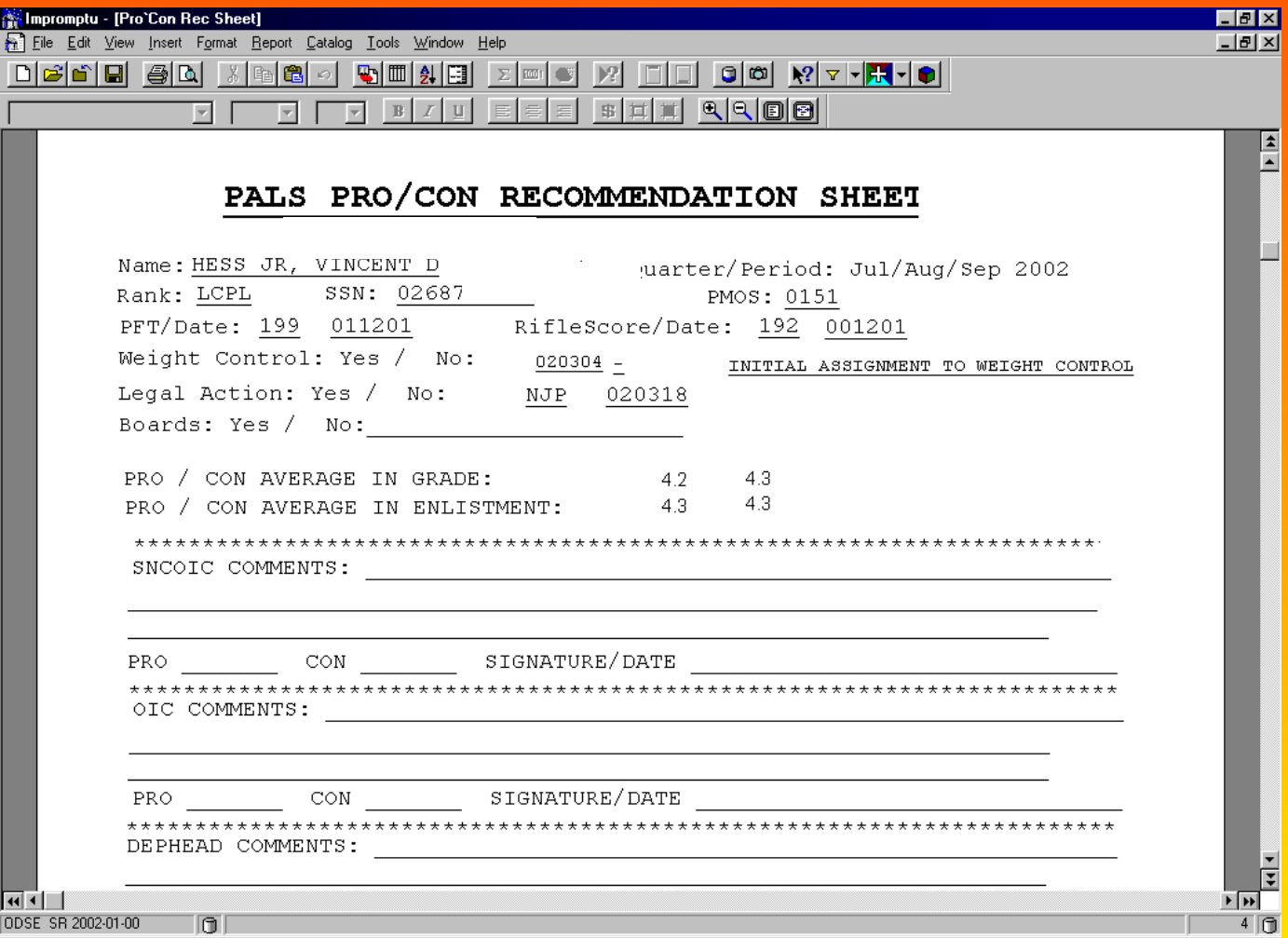
Templates

I chose the form letter template only for the space. Once you get your report you have to manipulate the data, one at a time and then add the section head commend lines manually.



Templates

But once you finish your report could look like this.



Chapter 10

Drill Through Reports

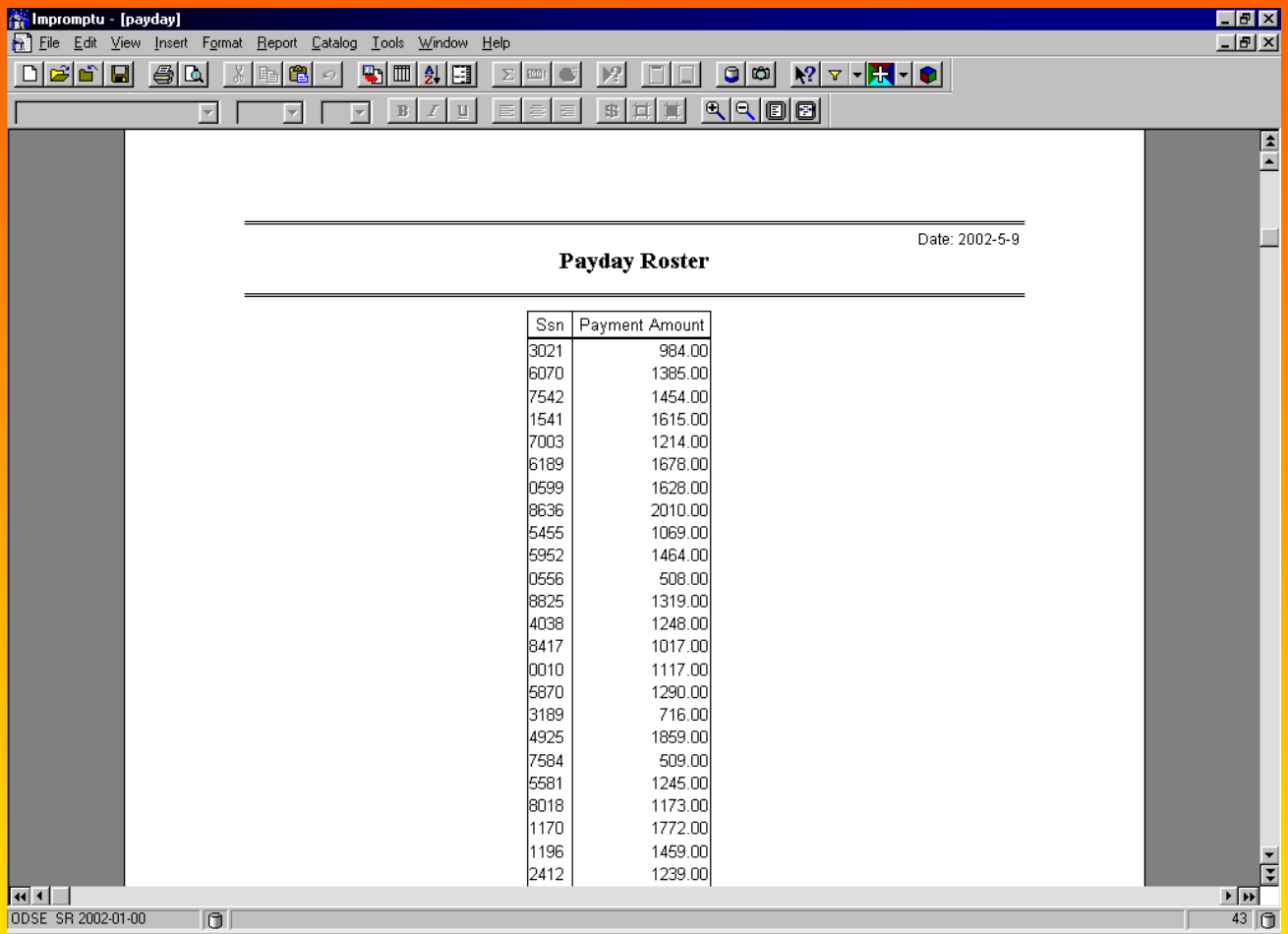
Chapter 10

A drill through report shows information behind a value you select in the current report. The drill through command is available for list reports & cross-tab reports.

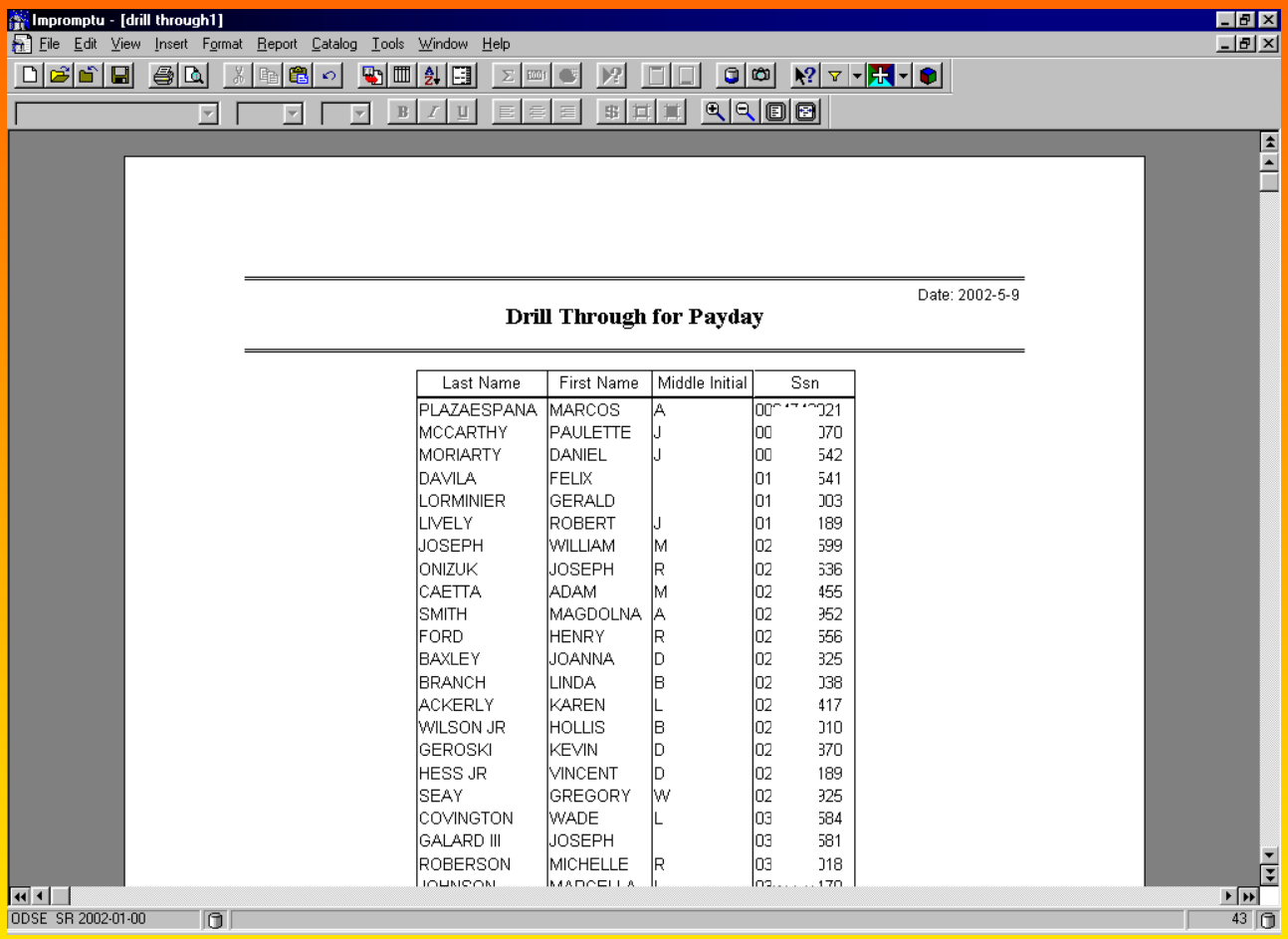
Lets build a basic payday roster for our section. IAW the Privacy Act we can not completely list a Full Name or SSN with payday information. So we will only show the last four digits of the SSN (see formatting chapter). And the payday amount. If we would like to see the Marine complete information (Last Name, First Name, MI, complete SSN) we can drill through to another report based off of the data item that we selected as the ‘drill through’.

We have to build two reports. The first will be the basic pay roster and the second is the drill through data, which in this case will be Last Name, First Name, MI, complete SSN.

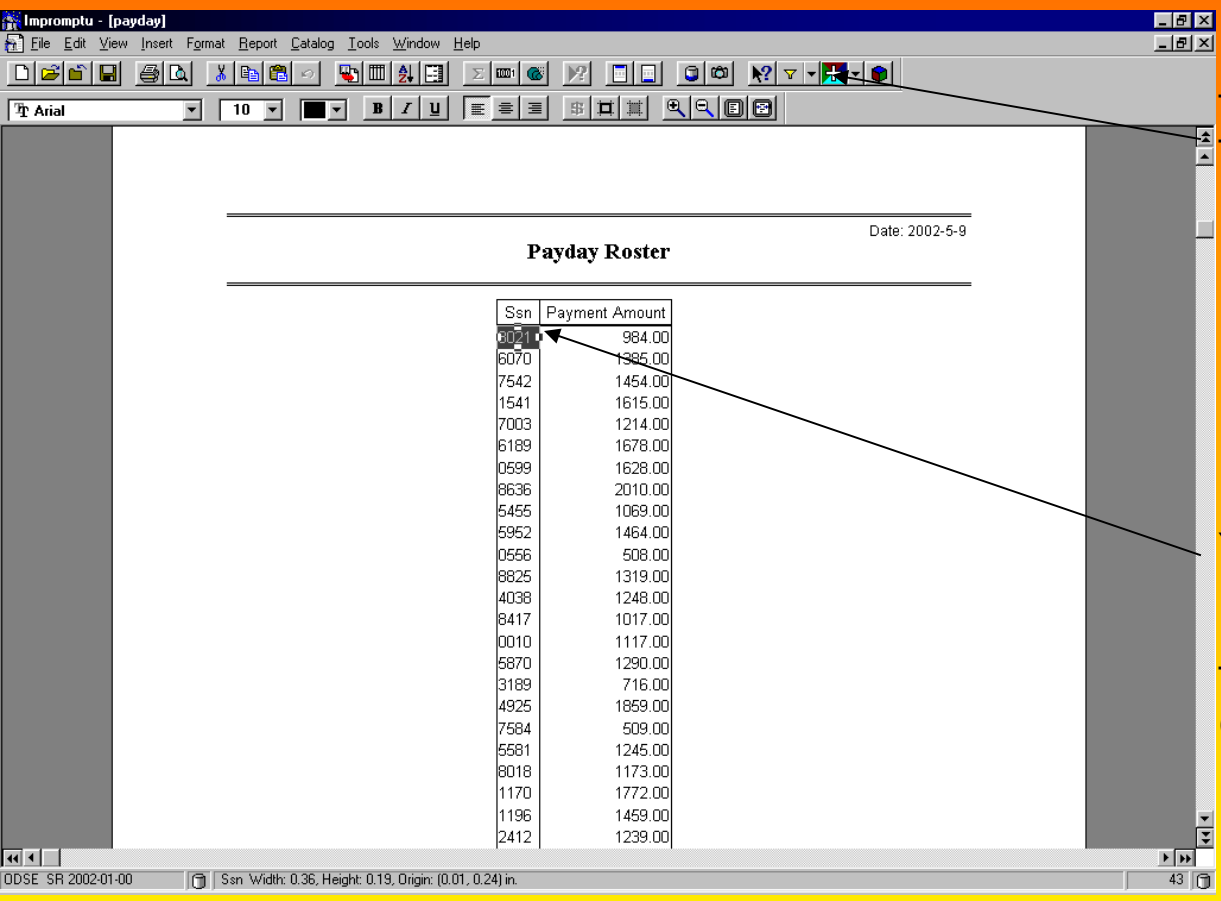
This is the first report.



This report is the drill through report. It shows the specifics for this Marine.



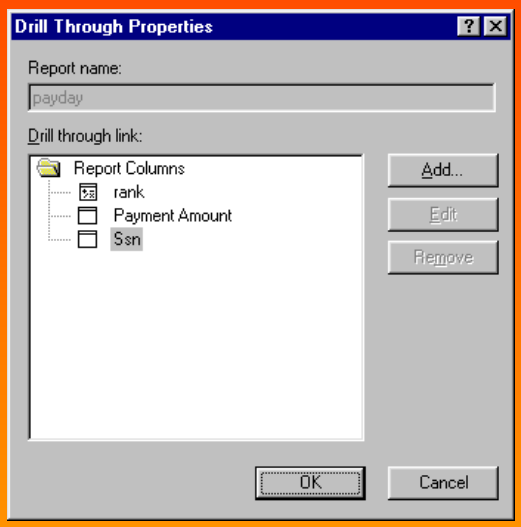
Once both reports are built, go to the original report. Click on the field that you want the ‘drill through’ on and then click on the drill through icon.



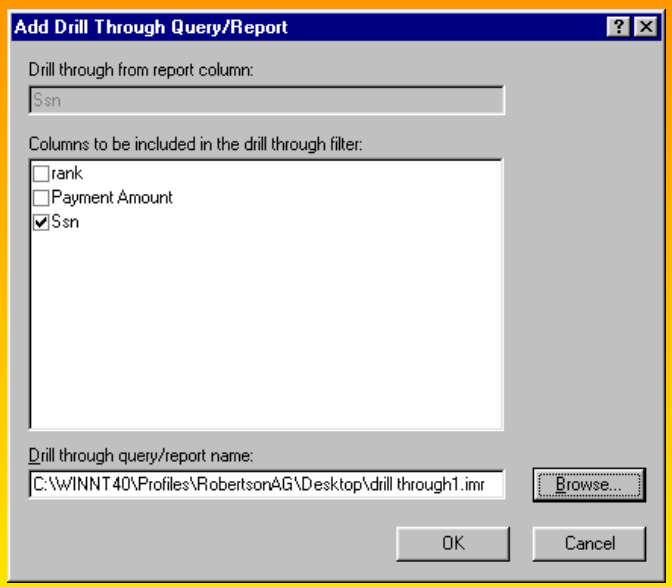
The Drill Through Icon

High-Light the Data item You would like the Drill Through On.

The drill through properties window will appear. Click on the Add button.

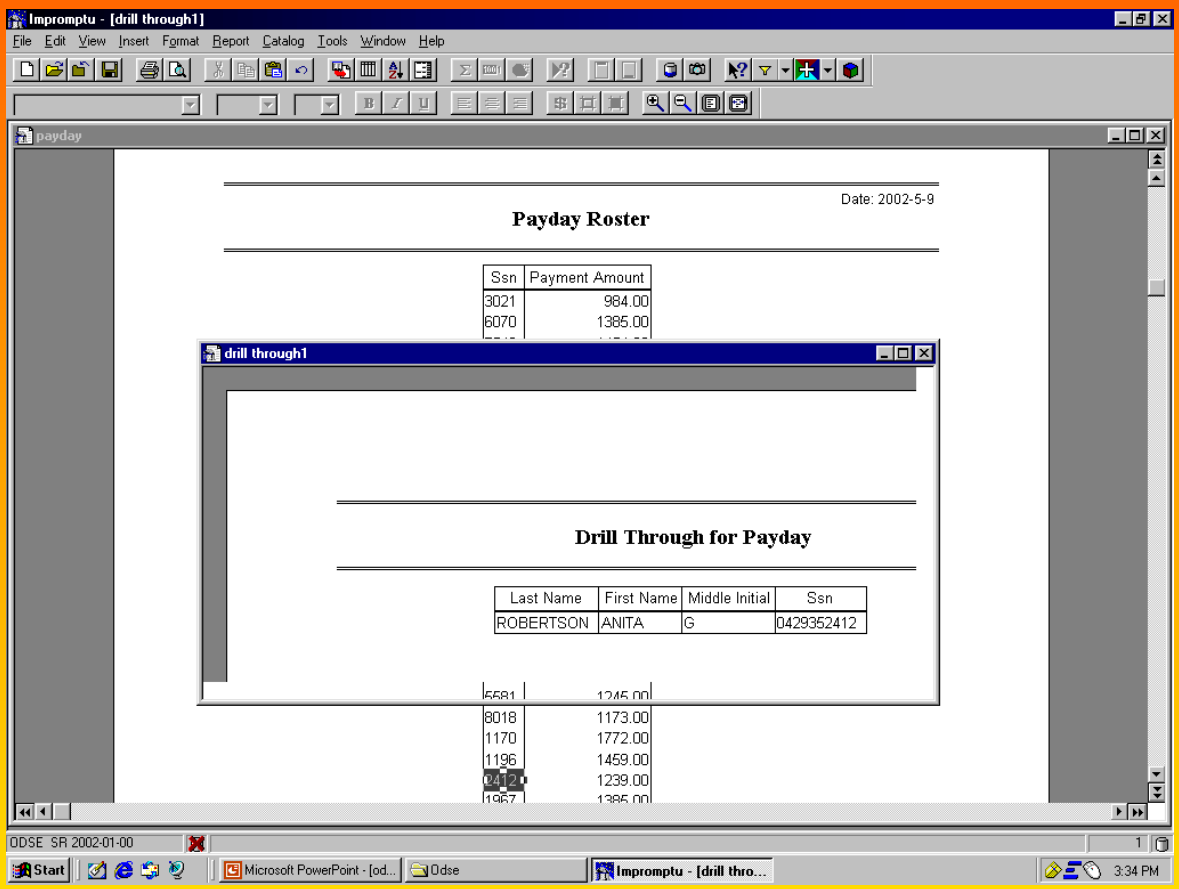


This window will appear. The check mark will already be in the box next to the item to drill through. Browse to get to the report that will be used as for the drill through. Then click on OK.



It will bring you back to the drill through properties window with a drill through icon beneath SSN. Click on OK.

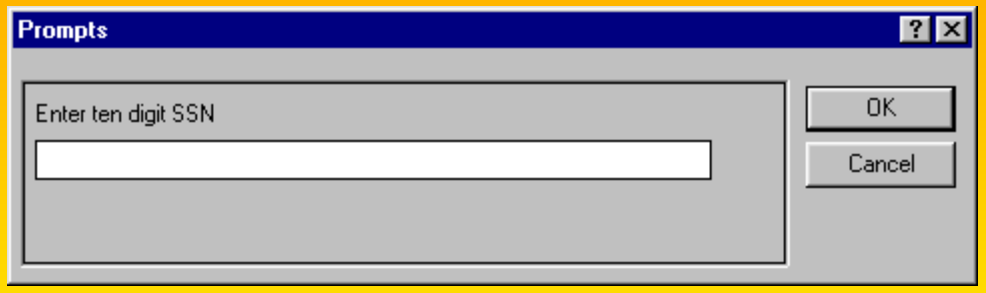
Now when you double click on the ‘drill through’ data item on your report and it will bring up your drill through report for that member.



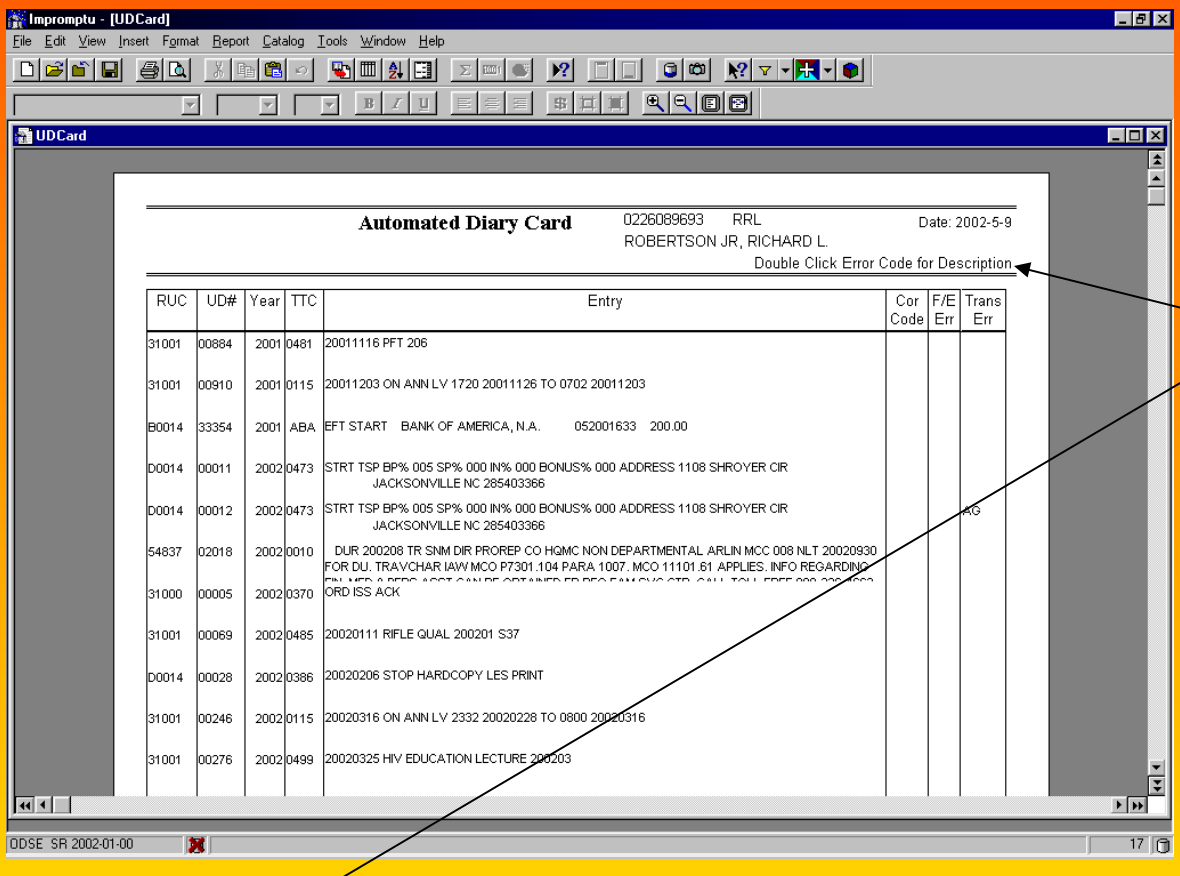
Chapter 10

This is an AWESOME report, It is an AUTOMATED Unit Diary Card. Great for researching transactions reported on a member.

This report features the following:
-Prompt Manager for the SSN
-Drill Through for the Error Code English Statement
-Template tailored to look like the Retrieval Screen in MCTFS.
When you open it, it prompts you for the SSN

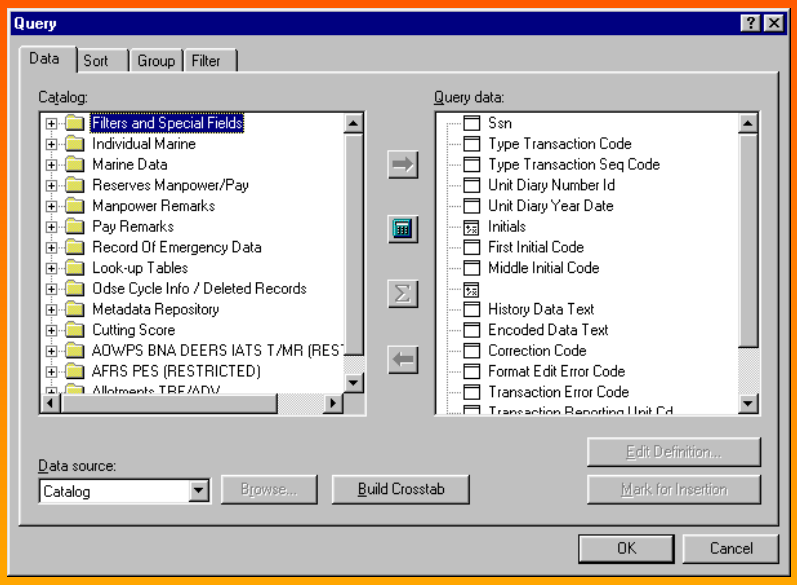


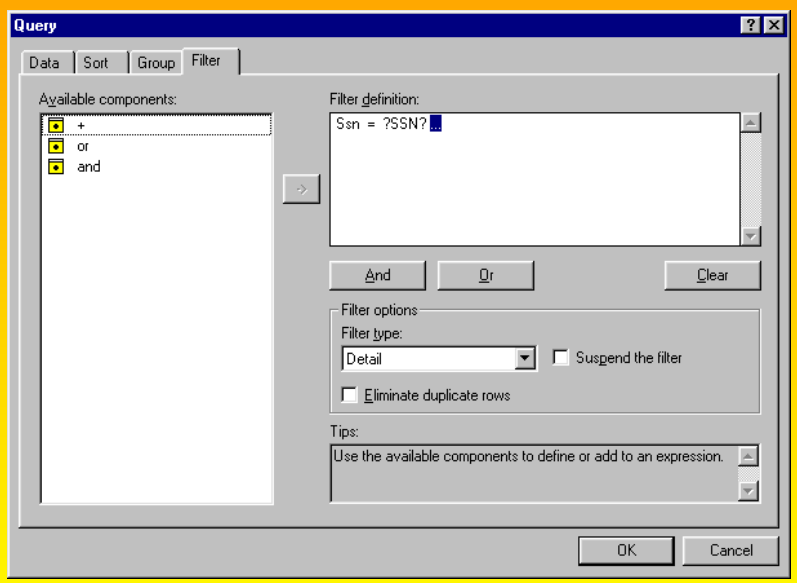
This is what the report would look like.



There is a notice that tells you, if there are rejected transactions to double click on the error code. This is the drill through. Lets see how he built this report.

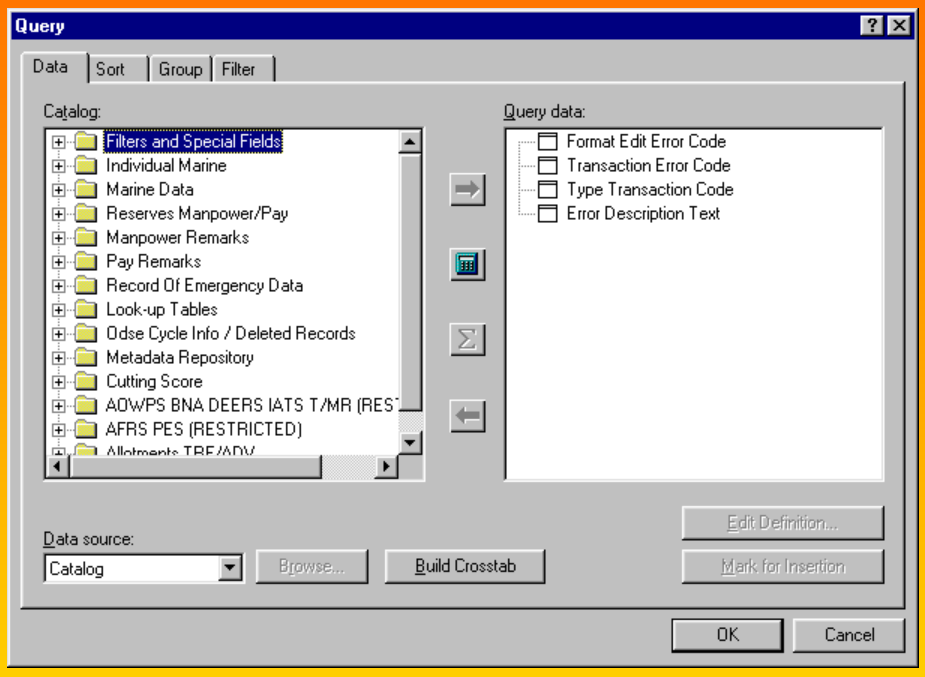
The query for the first report looks like this.





The **Sort** was the Unit Diary Date then the Unit Diary Number Id. There was no **Group** on the report. The filter was from prompt manager.

The second report is the drill through. The query looks like this.



Because there is a specific code that we are looking for there is no need to Sort, Group and Filter.

When we double click on the error code from the original report, it opens the report assigned as the drill through. It would look like this.